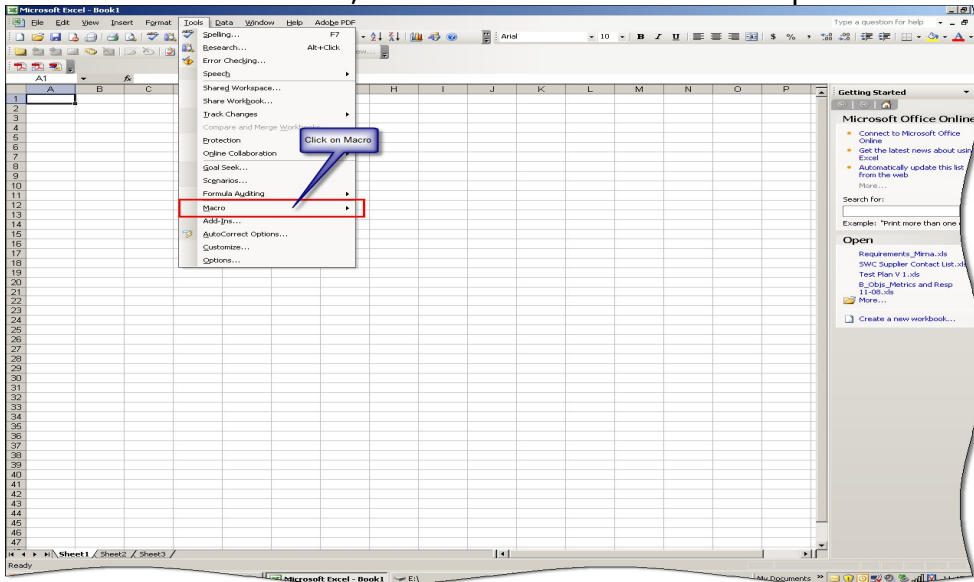




Instructions for the Use of the Requirements Sheet - 2003 Version

Enable the Content:

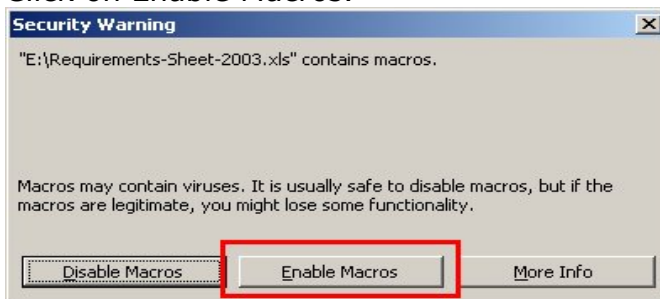
1. Open Microsoft Excel 2003.
2. Click on Tools and then, click on Macros from the drop-down list.



3. Click on Security.
4. Set the Security to Medium.



5. Open the Requirements-2003.xls Excel file.
6. Click on Enable Macros.



Run The Macro to Create the Mandatory, Mandatory Scored, and Additional Scored Spreadsheets:

1. Click on Tools.
2. Click on the button called **Create Spreadsheets**.

Click to create the spreadsheets

Major Categories	Question #	Questions per Major Categories	M MS AS	Major Categories %	Major Categories Points	Points per Question	Allow Attchts with Additional Information?	Attachment File Name
Proposal Factors					0		No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	
							No	

Clicking this button creates three spreadsheets:

- Mandatory Spreadsheet
- Mandatory Scored Spreadsheet
- Additional Scored Spreadsheet

You attach these spreadsheets to your RFP Template (SPD-SP016 State Entity eRFP Template) when you post it.

3. Once the Macro has created the spreadsheets, a message similar to this one displays indicating the location where the three spreadsheets are saved (the spreadsheets are saved on the same location where the Requirements-Sheet-2003 is located).

	A	B	C	D	E	F	G	H	I	J	K	L																												
1	Requirements Worksheet for RFPs and RFQCs																																							
2																																								
3	Solicitation Name:																																							
4	Proposal Factors % Split (100% if working on an RFQC):						80%	Totals		Legend																														
5	Total Number of Questions:		20	Cost Factors % Split (0% if working on an RFQC):			20%	100%	M	Mandatory																														
6	Total Number of Attachments in RFP/RFQC:		6	Proposal Factors Points:			800		MS	Mandatory Scored																														
7				Cost Factors Points:			200	1000.00	AS	Additional Scored																														
8																																								
9	<table border="1"> <thead> <tr> <th>Major Categories</th> <th>Question #</th> <th>Description</th> <th>M</th> <th>Major</th> <th>Allow Attnchs with Additional Information?</th> <th>Attachment File Name</th> </tr> </thead> <tbody> <tr> <td>Proposal Factors</td> <td>1</td> <td>Supplier must certify his/her compliance with the following by answering "yes": That the supplier guarantees and certifies that all items included in the supplier's proposal meet or exceed any and all such stated eRFP specifications and requirements except as expressly stated otherwise in the supplier's proposal.</td> <td>Mandatory</td> <td></td> <td>No</td> <td></td> </tr> <tr> <td></td> <td>2</td> <td>Supplier must certify his/her compliance with the following by answering "yes": That the technical and cost proposals submitted by the supplier shall be valid and held open for a period of one hundred and twenty (120) days from the final eRFP closing date and that the proposals may be held open for a lengthier period of time subject to the supplier's consent.</td> <td>Mandatory</td> <td></td> <td>No</td> <td></td> </tr> <tr> <td></td> <td>3</td> <td>Supplier must certify his/her compliance with the following by answering "yes": That the technical and cost proposals submitted by the supplier shall be valid and held open for a period of one hundred and twenty (120) days from the final eRFP closing date and that the proposals may be held open for a lengthier period of time subject to the supplier's consent.</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>												Major Categories	Question #	Description	M	Major	Allow Attnchs with Additional Information?	Attachment File Name	Proposal Factors	1	Supplier must certify his/her compliance with the following by answering "yes": That the supplier guarantees and certifies that all items included in the supplier's proposal meet or exceed any and all such stated eRFP specifications and requirements except as expressly stated otherwise in the supplier's proposal.	Mandatory		No			2	Supplier must certify his/her compliance with the following by answering "yes": That the technical and cost proposals submitted by the supplier shall be valid and held open for a period of one hundred and twenty (120) days from the final eRFP closing date and that the proposals may be held open for a lengthier period of time subject to the supplier's consent.	Mandatory		No			3	Supplier must certify his/her compliance with the following by answering "yes": That the technical and cost proposals submitted by the supplier shall be valid and held open for a period of one hundred and twenty (120) days from the final eRFP closing date and that the proposals may be held open for a lengthier period of time subject to the supplier's consent.				
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10																																								
11																																								
12																																								

Workbooks Created

The workbooks have been exported out into the folder: P:\RFP Training\RFP Development Process\Requirements.

OK

- Once you create the spreadsheets, you need to refine and protect them. Follow the steps in the next section.

Adding Yes/No Selections to the Mandatory Spreadsheet to Allow a Response from the Suppliers

Once you create the spreadsheets, you need to protect them and refine them. Follow these steps:

Mandatory Spreadsheet:

1. Access Microsoft Excel.
2. Open the Mandatory.xls spreadsheet.

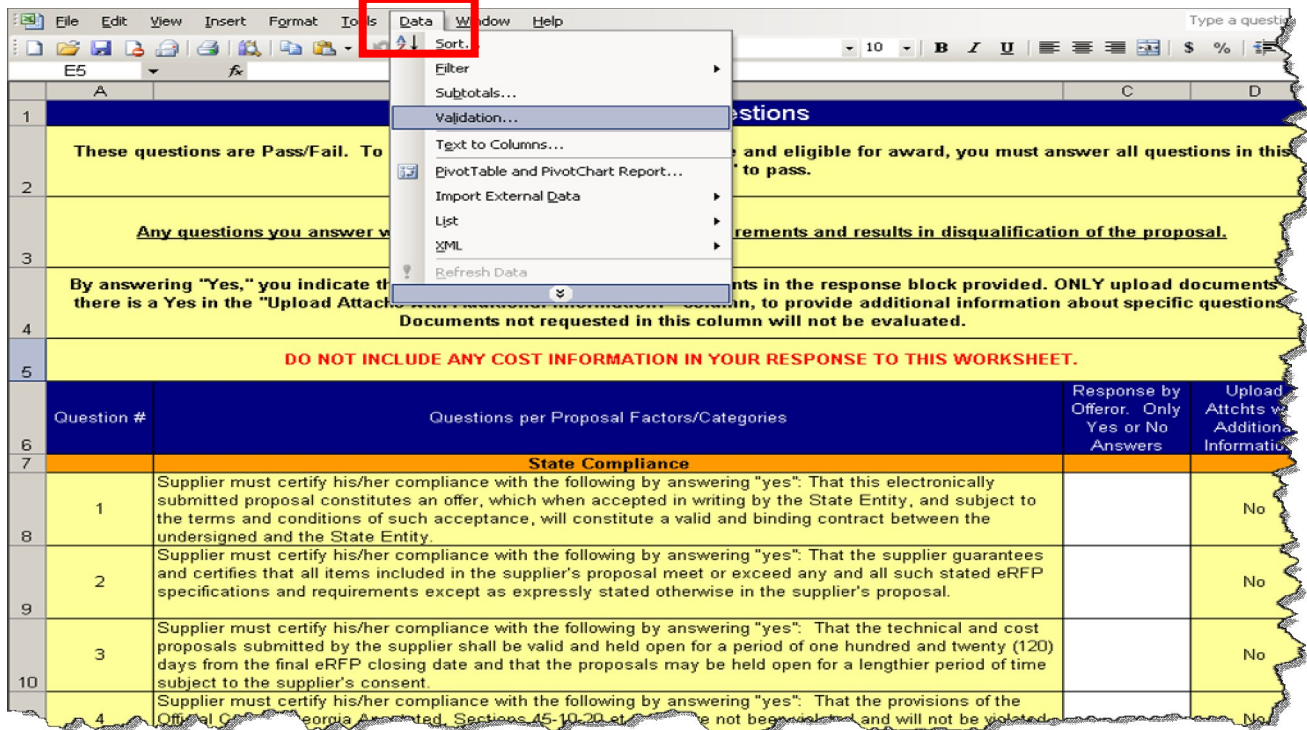
Adding Yes/No selections for the Suppliers to respond:

1. To add a drop-down Yes/No selection to allow the suppliers to respond to the Mandatory requirements, click on the cell (or one of the cells) where you want to add the Yes/No selection. In this case, you want to click the first cell where the suppliers provide a response to the requirement in the **Response by Offeror. Only Yes or No Answer** column (row 8 and column c, in this example).

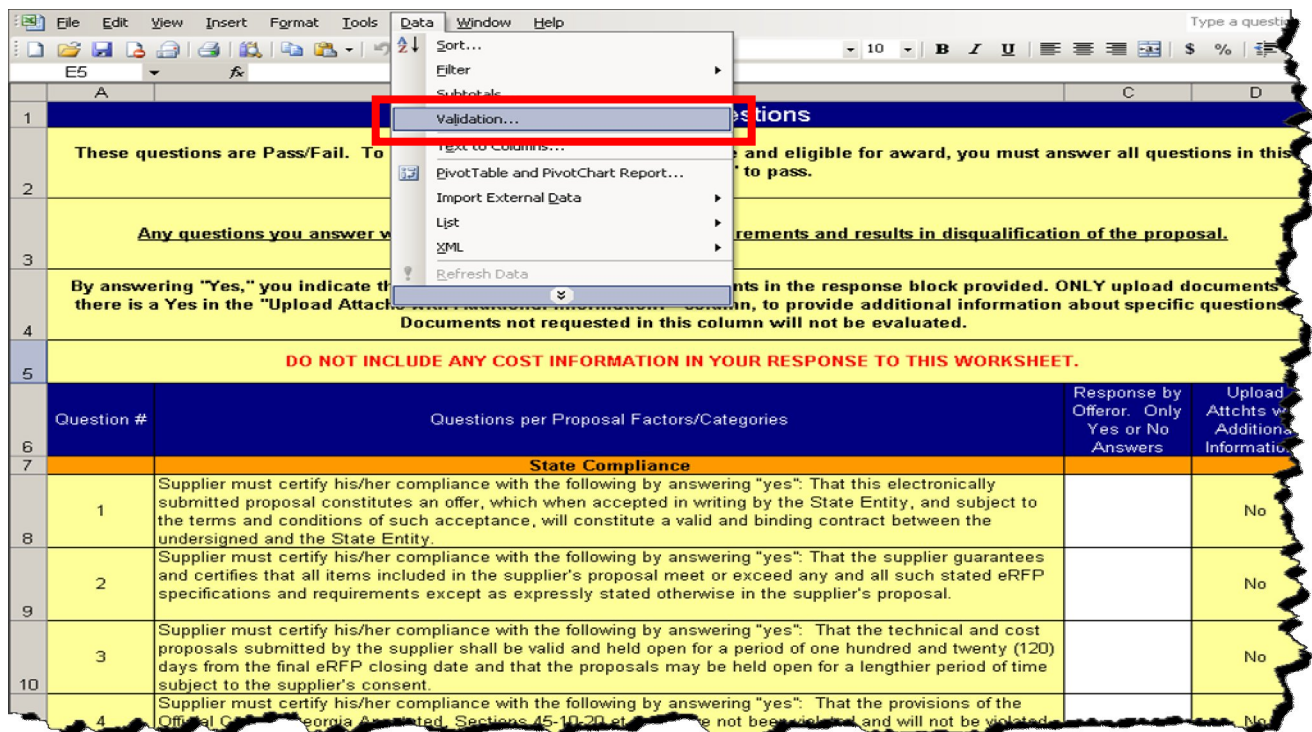
	A	B	C	D
1	Mandatory Questions			
2	These questions are Pass/Fail. To be considered responsive, responsible and eligible for award, you must answer all questions in this section with a "YES" to pass.			
3	Any questions you answer with a "NO" will fail the technical requirements and results in disqualification of the proposal.			
4	By answering "Yes," you indicate that you meet the individual requirements in the response block provided. ONLY upload documents if there is a Yes in the "Upload Attachs with Additional Information?" column, to provide additional information about specific question. Documents not requested in this column will not be evaluated.			
5	DO NOT INCLUDE ANY COST INFORMATION IN YOUR RESPONSE TO THIS WORKSHEET.			
6	Question #	Questions per Proposal Factors/Categories	Response by Offeror. Only Yes or No Answer	Upload Attchs with Addition Information
7	State Compliance			
8	1	Supplier must certify his/her compliance with the following by answering "yes": That this electronically submitted proposal constitutes an offer, which when accepted in writing by the State Entity, and subject to the terms and conditions of such acceptance, will constitute a valid and binding contract between the undersigned and the State Entity.		No
9	2	Supplier must certify his/her compliance with the following by answering "yes": That the supplier guarantees and certifies that all items included in the supplier's proposal meet or exceed any and all such stated eRFP specifications and requirements except as expressly stated otherwise in the supplier's proposal.		No
10	3	Supplier must certify his/her compliance with the following by answering "yes": That the technical proposals submitted by the supplier shall be valid and held open for a period of one hundred and two days from the final eRFP closing date and that the proposals may be held open for a lengthier period subject to the supplier's consent.		
	4	Supplier must certify his/her compliance with the following by answering "yes": That the provisions of Official Code of Georgia Annotated, Sections 45-10-20 et seq. have been promulgated and will not be		

Select the cell where you want to place the Yes/No selection

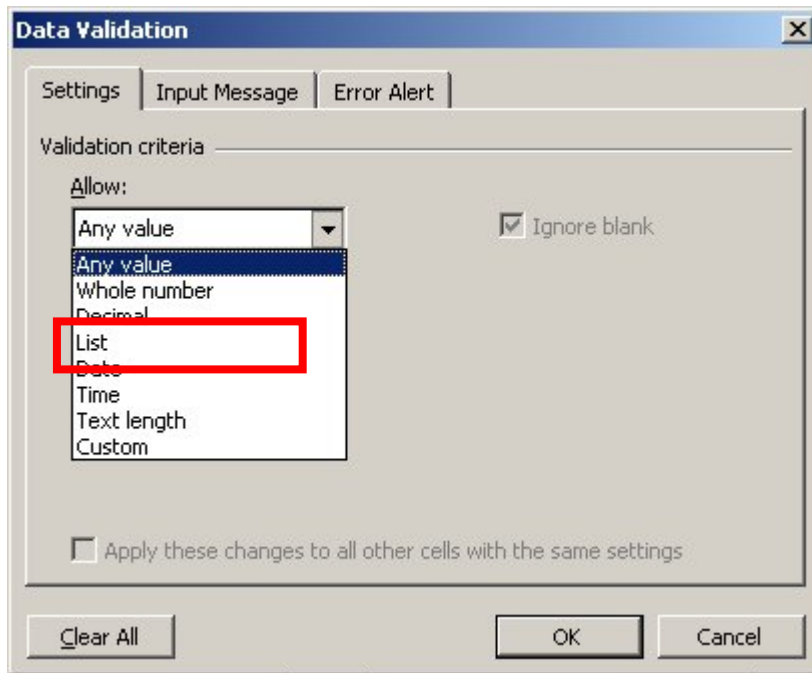
2. Once you have clicked on the cell where you want to place the Yes/No selections, click on **Data** on the Excel Main Menu Bar to list the selections available.



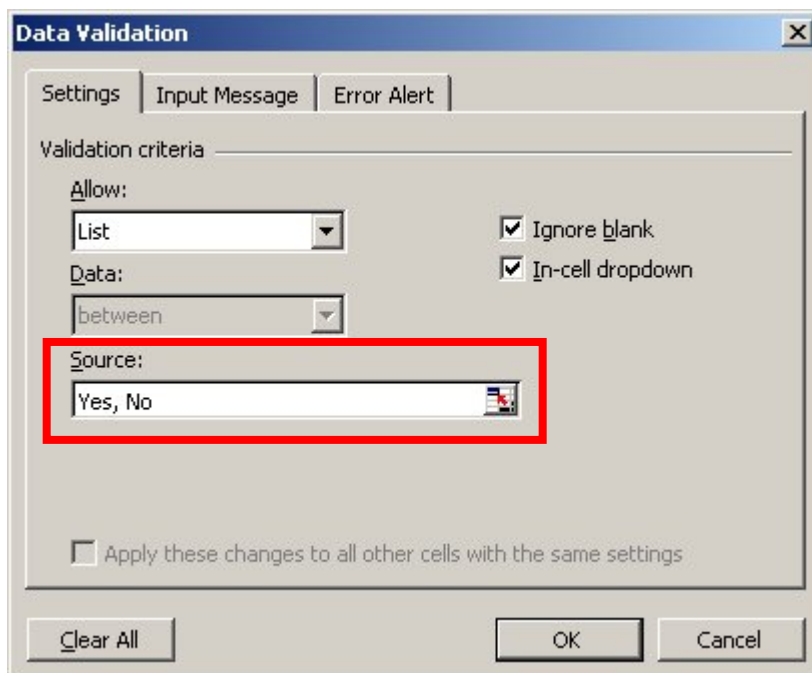
3. Select **Validation** from the list of selections on the drop down menu.



4. When the Validation dialog box displays, drop the list in the Allow field and select **List**.



5. After selecting List in the Allow field, enter **Yes, No** in the Source field and click **OK**.



6. At this point, the selected cell now has a selection to enter Yes or No. Highlight the cell to copy to the rest of the cells in that column.

	A	B	C	D
1	Mandatory Questions			
2	These questions are Pass/Fail. To be considered responsive, responsible and eligible for award, you must answer all questions in this section with a "YES" to pass.			
3	<u>Any questions you answer with a "NO" will fail the technical requirements and results in disqualification of the proposal.</u>			
4	By answering "Yes," you indicate that you meet the individual requirements in the response block provided. ONLY upload documents if there is a Yes in the "Upload Attachs with Additional Information?" column, to provide additional information about specific question. Documents not requested in this column will not be evaluated.			
5	DO NOT INCLUDE ANY COST INFORMATION IN YOUR RESPONSE TO THIS WORKSHEET.			
6	Question #	Questions per Proposal Factors/Categories	Response by Offeror. Only Yes or No Answers	Upload Attchs with Additional Information
7	State Compliance			
8	1	Supplier must certify his/her compliance with the following by answering "yes": That this electronically submitted proposal constitutes an offer, which when accepted in writing by the State Entity, and subject to the terms and conditions of such acceptance, will constitute a valid and binding contract between the undersigned and the State Entity.	<input type="text"/> <input type="text"/>	No
9	2	Supplier must certify his/her compliance with the following by answering "yes": That the supplier guarantees and certifies that all items included in the supplier's proposal meet or exceed any and all such stated eRFP specifications and requirements except as expressly stated otherwise in the supplier's proposal.	<input type="text"/> <input type="text"/>	No
10	3	Supplier must certify his/her compliance with the following by answering "yes": That the technical and cost proposals submitted by the supplier shall be valid and held open for a period of one hundred and twenty (120) days from the final eRFP closing date and that the proposals may be held open for a lengthier period of time subject to the supplier's consent.	<input type="text"/> <input type="text"/>	No
	4	Supplier must certify his/her compliance with the following by answering "yes": That the provisions of the Official Code of Annotated Statutes, Sections 45-10-20 et seq. have not been violated and will not be violated.	<input type="text"/> <input type="text"/>	No

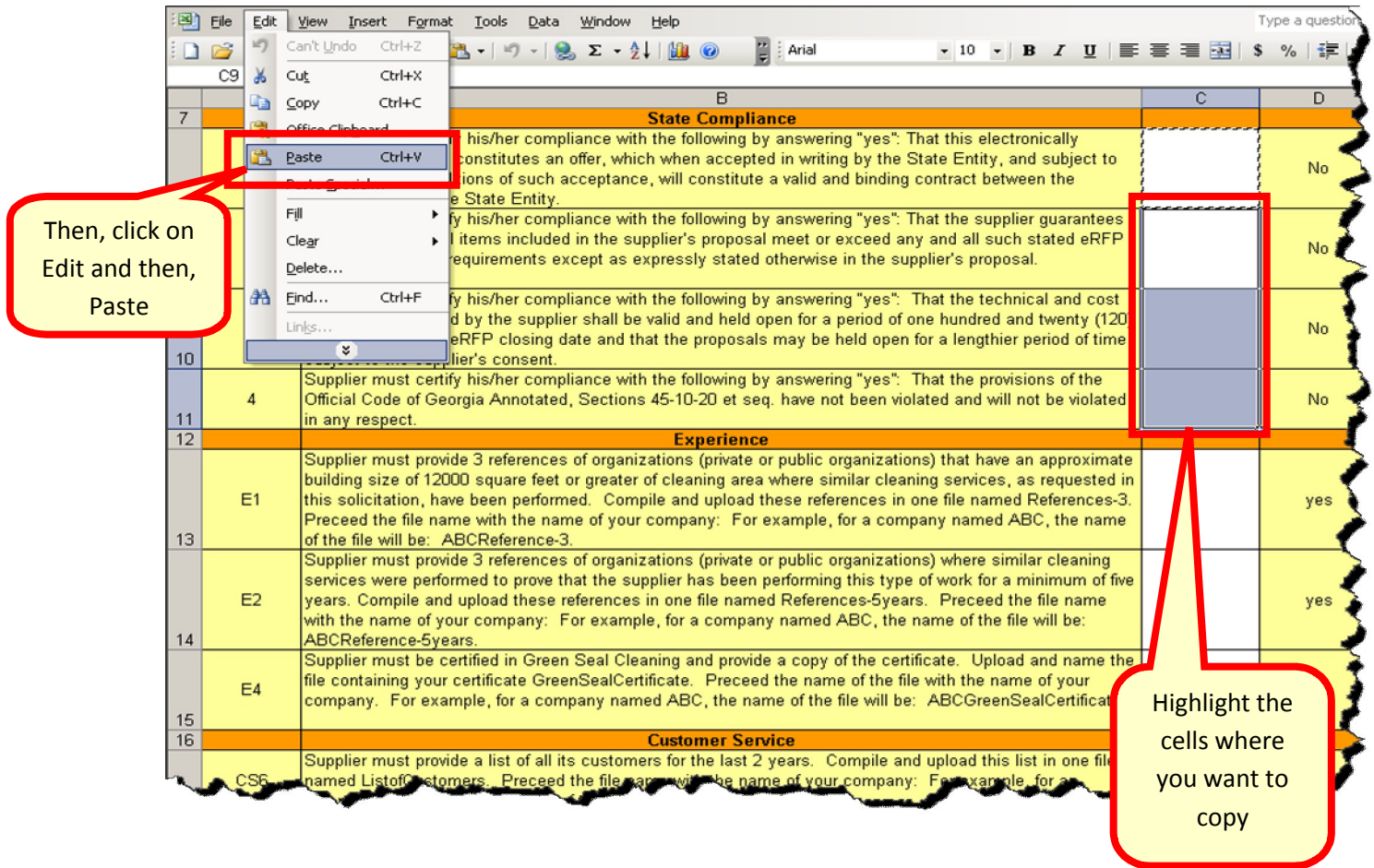
- To copy, select the cell you want to copy (row 8 and column c, in this example). Then, click on the Copy icon or click on Edit and then, select Copy from the drop-down list. Then, highlight the rest of the cells where the supplier responds with a Yes or No and paste it until all appropriate cells have the drop-down list.

Then, click on Edit and then, on Copy

Click on the cell you want to copy

Question #	Questions per Proposal Factors/Categories	Response by Offeror. Only Yes or No Answers	Upload Attchts with Additional Information?
State Compliance			
1	Supplier must certify his/her compliance with the following by answering "yes": That this electronically submitted proposal constitutes an offer, which when accepted in writing by the State Entity, and subject to the terms and conditions of such acceptance, will constitute a valid and binding contract between the undersigned and the State Entity.		No
2	Supplier must certify his/her compliance with the following by answering "yes": That the supplier guarantees and certifies that all items included in the supplier's proposal meet or exceed any and all such stated eRFP specifications and requirements except as expressly stated otherwise in the supplier's proposal.		No
3	Supplier must certify his/her compliance with the following by answering "yes": That the technical and cost proposals submitted by the supplier shall be valid and held open for a period of one hundred and twenty (120) days from the final eRFP closing date and that the proposals may be held open for a lengthier period of time subject to the supplier's consent.		No
4	Supplier must certify his/her compliance with the following by answering "yes": That the provisions of the Official Code of Georgia Annotated, Sections 45-10-20 et seq. have not been violated and will not be violated in any respect.		No

- Then, highlight the rest of the cells where you want the Yes/No selection to be copied and click on **Edit**, then on **Paste** to copy the original cell.

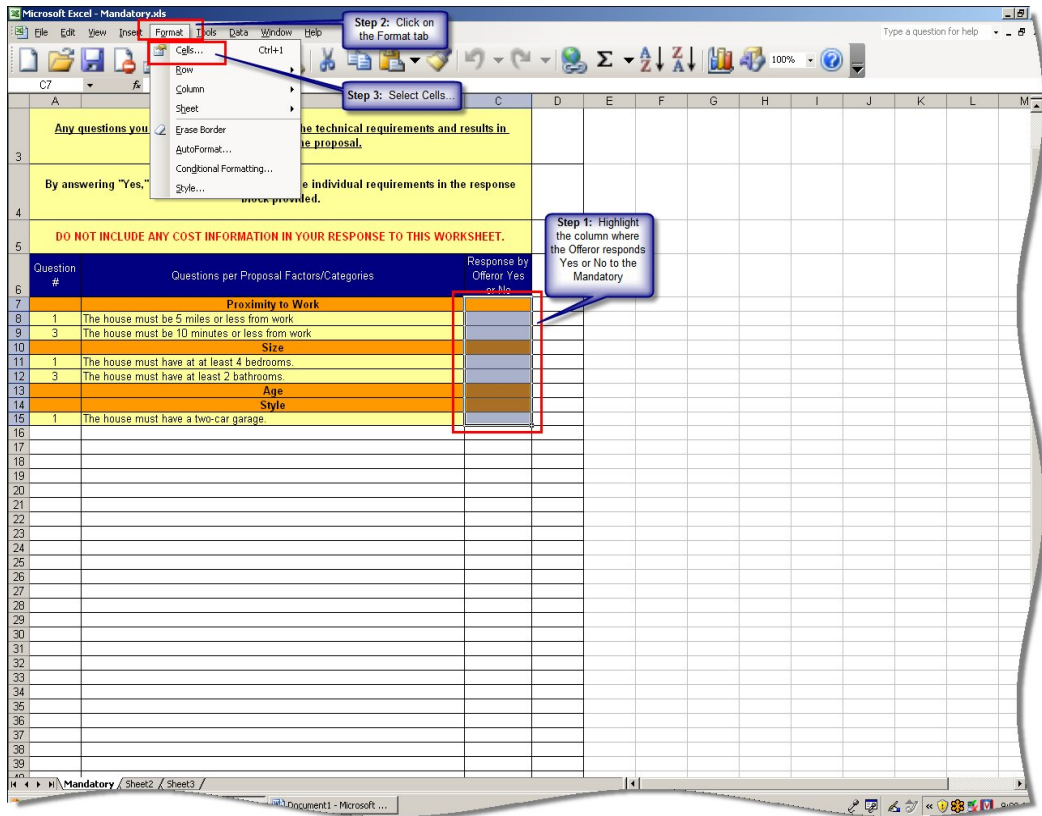


9. Repeat step 8 for the rest of the cells where you want to copy.

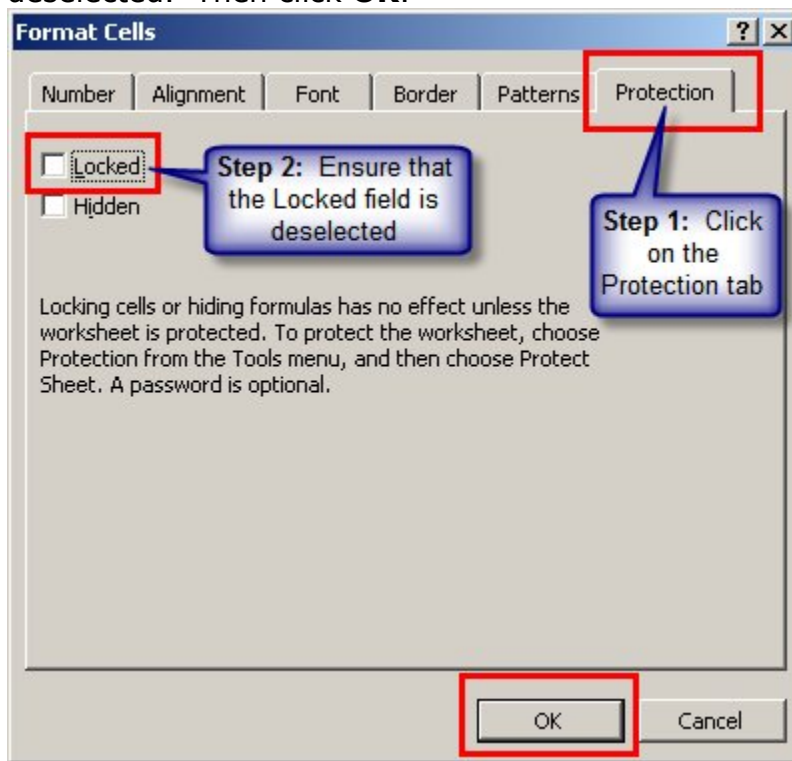
Protecting the worksheet

Once you have setup the cells the way you need them, you are ready to protect the worksheet. Protecting the worksheet will ensure that the suppliers do not change the configuration or the contents of your worksheet.

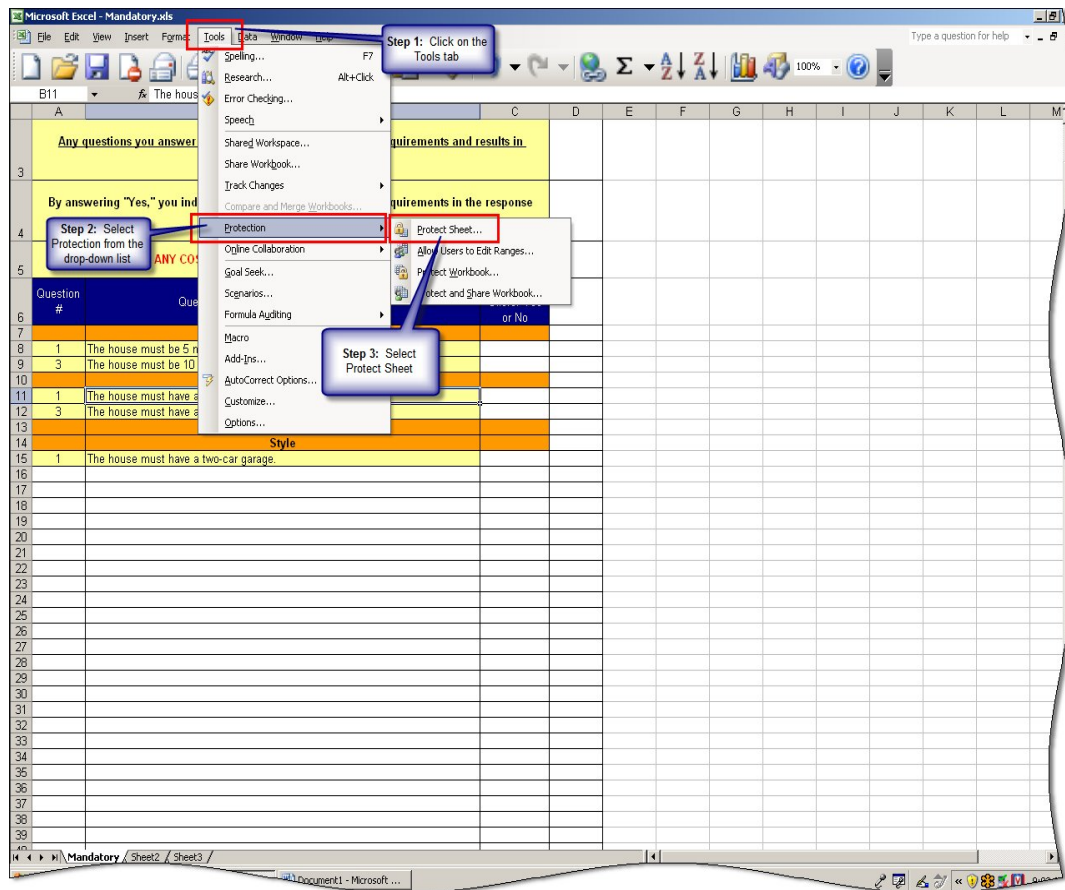
1. Highlight the cells (column) where the supplier will respond Yes/No.
Then, click on the Format tab and select Cells... from the drop-down list.



2. Click on the **Protection** tab. Then, ensure that the Locked field is deselected. Then click **OK**.



3. Click on the **Tools** tab and select Protection... from the drop-down list. Then, select **Protect Sheet**.



4. When the Protect Sheet dialog box displays, ensure that Protect worksheet and content of locked cells, Select Locked cells, and Select unlocked cells are selected. Then, enter a password that you will be able to remember and click **OK**.



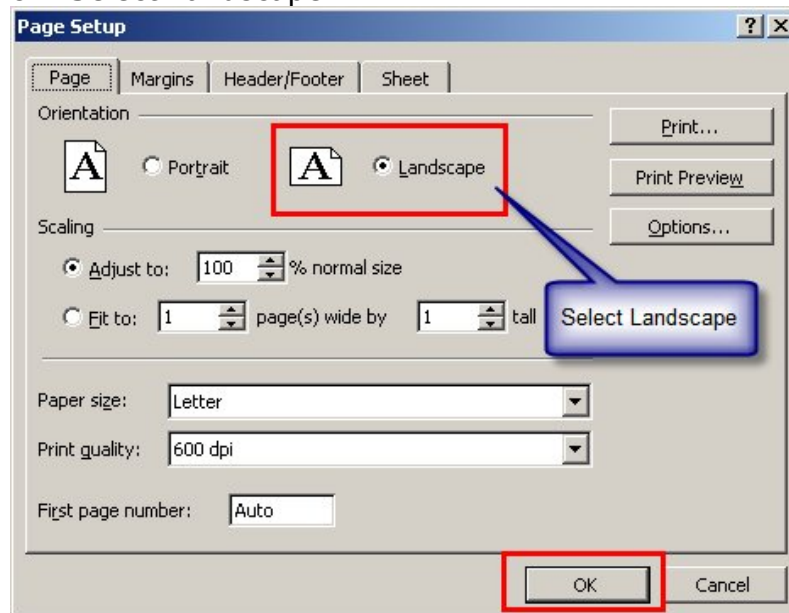
5. Reenter the same password. Then, click **OK** to protect your worksheet.



6. Save the Worksheet.

Preparing the Mandatory and Additional Scored Worksheets:

1. For the Mandatory Scored and the Additional Scored worksheets, ensure that they print correctly. To do this:
 - a. Click on File.
 - b. Select Page Set Up...
 - c. Select Landscape.



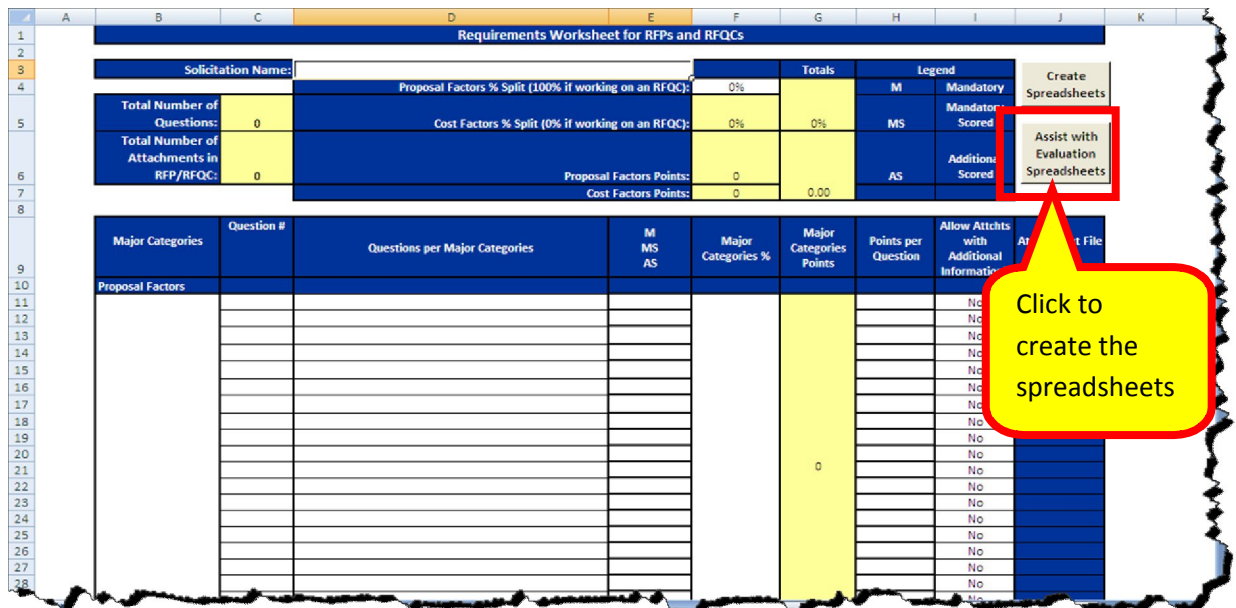
2. Protect the worksheets as you did with the Mandatory worksheet. To do this repeat steps 1 through 6 as indicated in the previous section for the Mandatory Scored and Additional Scored worksheets. Ensure that all your worksheets are protected before you post them.

When Ready to Create the Evaluation Forms

Once you are ready to create the evaluation form (SPD-EP005 Master Technical Evaluation Template form) to send to the Evaluation Committee for evaluation of the RFP technical requirements, you need to obtain information (questions, and points assigned) from the RFP requirements worksheet (form SPD-057 Requirements Sheet for RFP or Scored RFQC).

Using the **Assist with The evaluation Worksheets** button, located on the top right of the SPD-057 Requirements Sheet for RFP or Scored RFQC form you just completed. This button allows you to obtain the information you need to complete the SPD-EP005 Master Technical Evaluation Template form.

1. Click on the button called **Assist with Evaluation Spreadsheets.**



2. The following worksheets are saved on the same folder as the one where the RFP/RFQC Requirements worksheet is located:
 - A worksheet with the information you need to enter in the SPD-EP005 Master Technical Evaluation Template form for the Mandatory Scored questions (questions and points assigned to each question).

- A worksheet with the information you need to enter in the SPD-EP005 Master Technical Evaluation Template form for the Additional Scored questions (questions and points assigned to each question).

The following are sample worksheets:

- Mandatory scored and points assigned worksheet.

	A	B	C	D	E	F	G	H	I	J	K
1		Mandatory Scored Questions and Points Assigned									
2		Use the Information in this Spreadsheet to create the Evaluation Sheets									
3	Q#	Question	Assigned Points								
4		State Compliance									
5		Experience									
6		Services and Supplies									
7	1	Describe in detail the typical cleaning services which your company performs at commercial building sites with a minimum square footage of 12000. Include time when it is performed, activities, cleaning tools (powered or non-powered), cleaning supplies, and number of people typically used in the job.	180								
8	3	Provide a project plan that outlines the resources, length of time, and activities that your company will be performing at our site. Upload this project plan in a file called ProjectPlan. Precede the name of the file with the name of your company. For example, for a company named ABC, the name of the file will be: ABC-ProjectPlan.	150								
9	4	Provide a list of commercial equipment and supplies that will be used to provide this services to the state. Upload a file named EquipmentandSupplies. Precede the name of the file with the name of your company. For example, for a company named ABC, the name of the file will be: ABC-EquipmentandSupplies.	100								
10		Customer Services									
11	1	Provide a description of the procedures that your company follows to resolve customer issues related to performance.	40								
12	2	Provide a description of the procedures that your company follows to resolve customer issues related to resources.	40								
13	3	Provide a description of the procedures that your company follows to resolve customer issues related to equipment.	40								
14	4	Provide a description of the procedures that your company follows to resolve customer issues related to supplies.	40								

- Additional Scored questions (questions and points assigned to each question).

	A	B	C	D	E	F	G	H	I	J	K
1		Additional Scored Questions and Points Assigned									
2		Use the Information in this Spreadsheet to create the Evaluation Sheets									
3	Q#	Question	Assigned Points								
4		State Compliance									
5		Experience									
6		Services and Supplies									
7	3	Provide a description of the training that is provided to the cleaning staff; including activities, length, monitoring, on-the-job activities and supervision, etc.; to ensure that the staff is capable and qualified to perform the work outlined in this solicitation.	40								
8	2	Describe environmentally friendly services and or supplies that can be used for this site and outline the benefits they provide to the state.	50								
9		Customer Services									
10	8	Describe a situation where a customer was disappointed in the service provided, and how you responded, resulting in a positive outcome.	20								
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You use these worksheets to create the Master Technical Evaluation Template form by either entering the information (or copying it to) onto the evaluation form.