Instructions for the Use of the Requirements Sheet - 2007 Version

Enable the Content:

1. Open Microsoft Excel 2007.
2. Open the Requirements-2007.xlsm Excel file.
3. Click on Options.
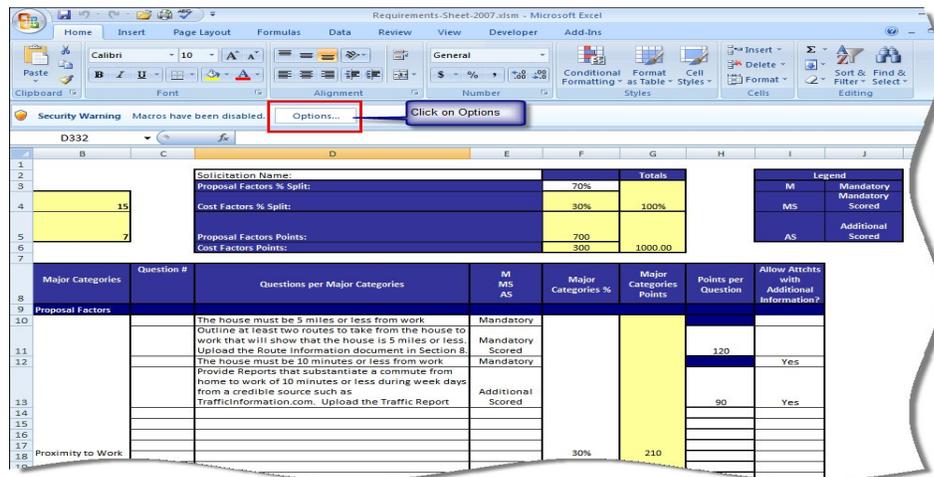
4. Click on Enable this content and then, click **OK**.

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

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

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.

2. If this message displays, it means that you have not enabled the content. Go back to the previous section and follow the instructions on how to enable the content.

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 in the same location where the Requirements-Sheet-2007 is located).
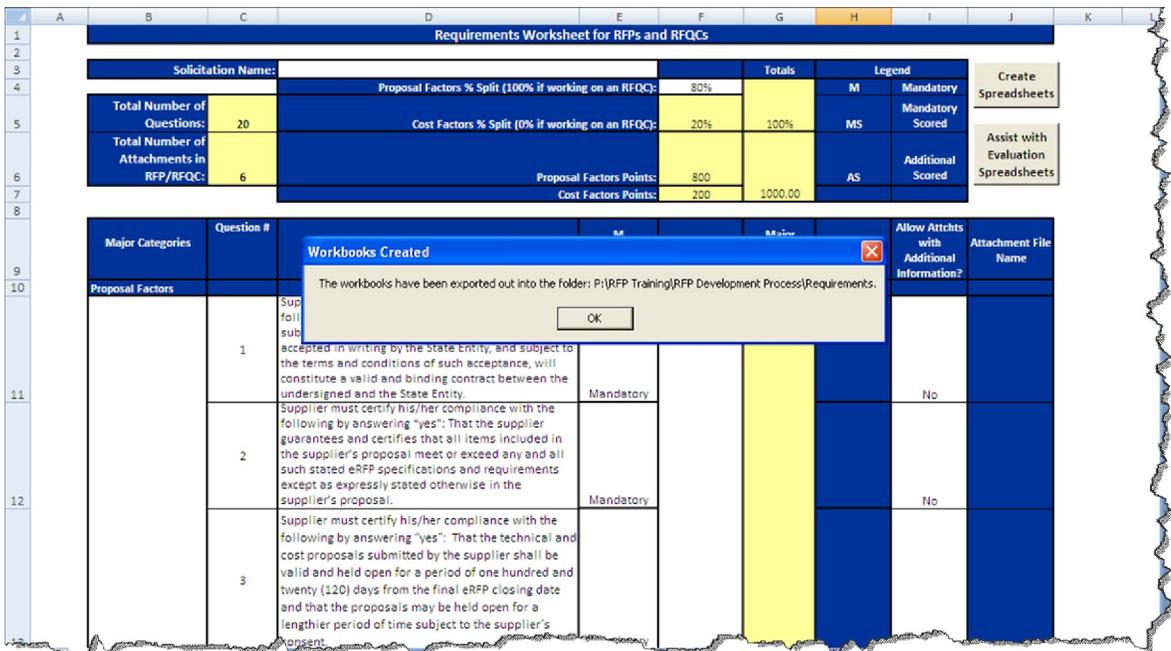
4. Click OK and open the spreadsheets in the folder indicated in your message.

5. 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

1. Open the Mandatory.xls spreadsheet.
2. 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).

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

4. Click on Data Validation.
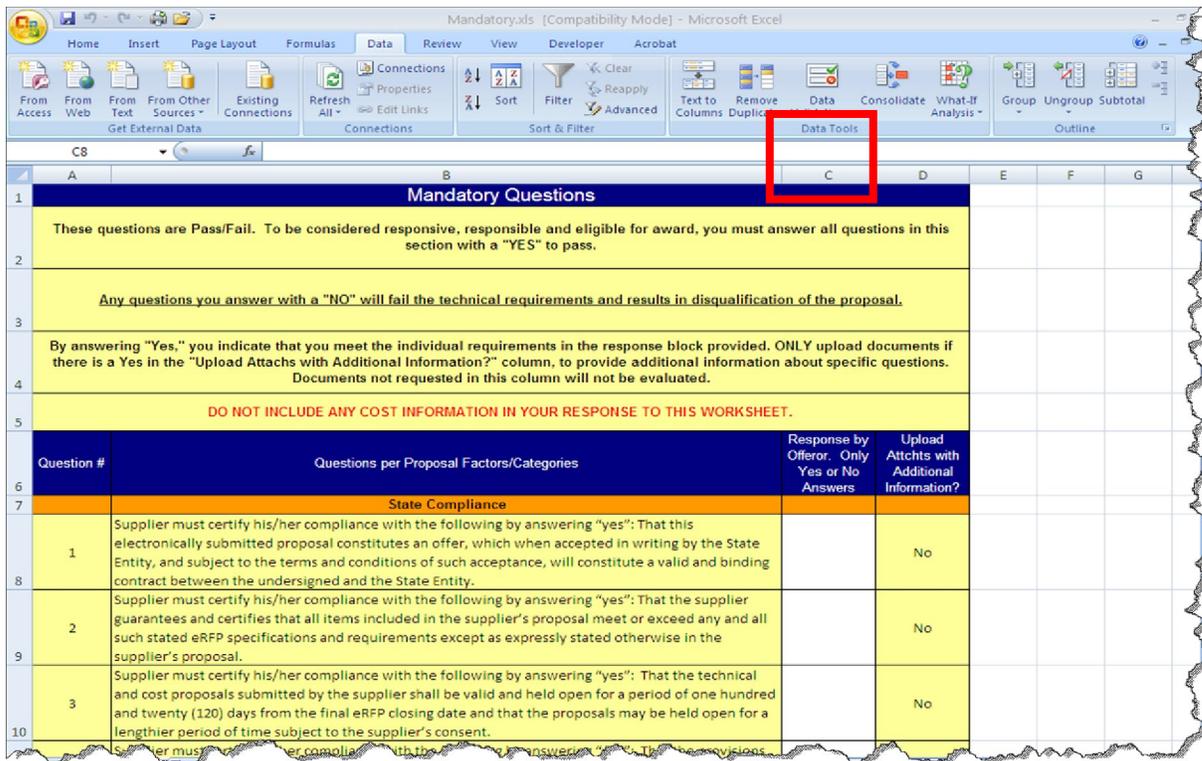
5. When the Data Validation dialog box displays, click on the drop down list in the **Allow** field and select **List** and click **OK**.
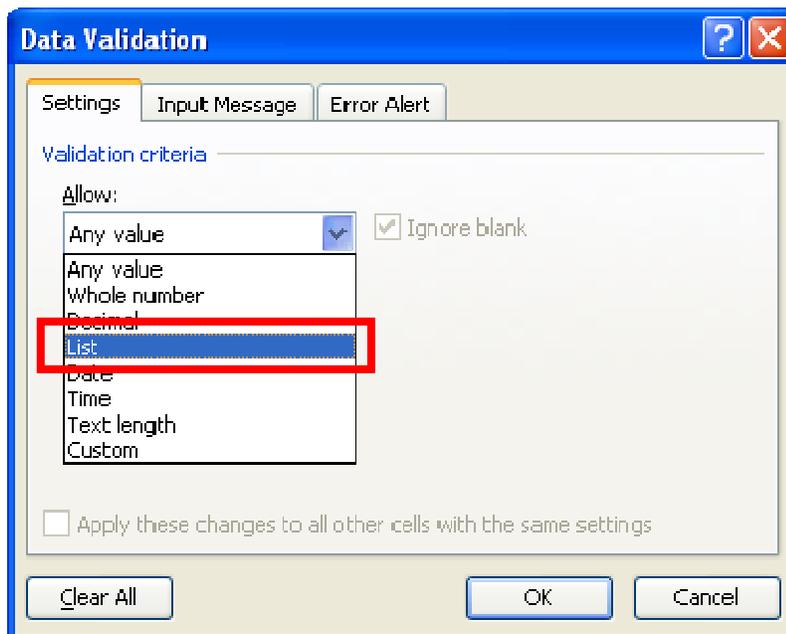
6. Enter **Yes, No** in the **Source** field and click **OK**.
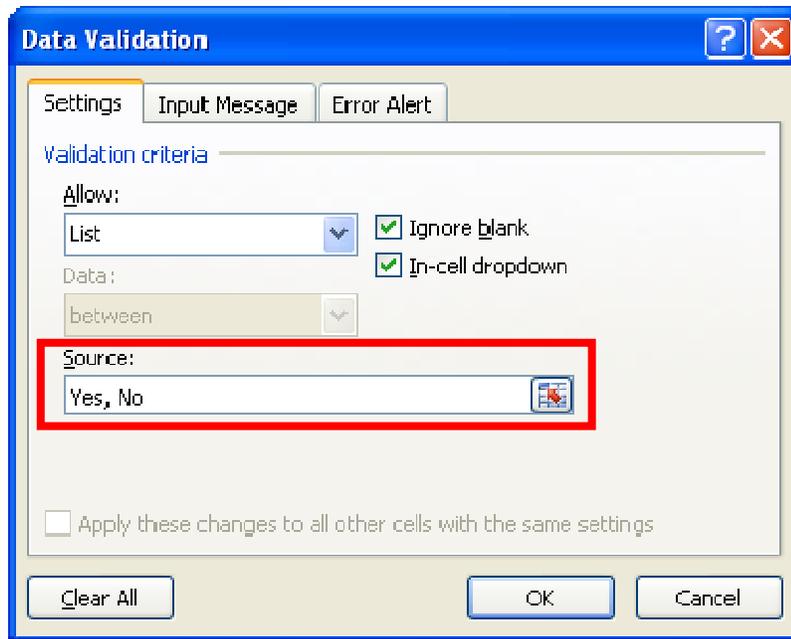
7. When you click OK, the cell now shows the ability to display a drop-down list for the supplier to select Yes or No.
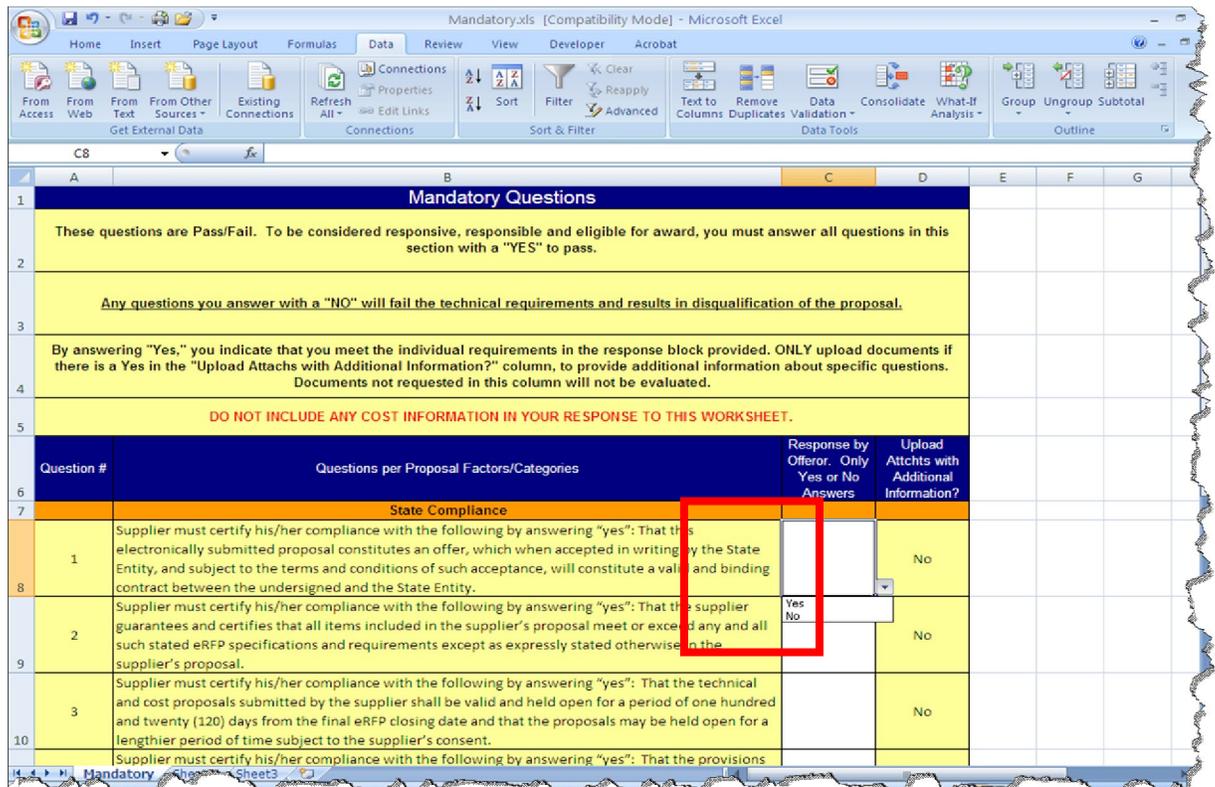
8. Click on the cell with the Yes/No drop-down list to copy it to the rest of the appropriate cells in that column. Then, click on the **Copy** icon.

Then, click on the Copy icon

Click on the cell you want to copy
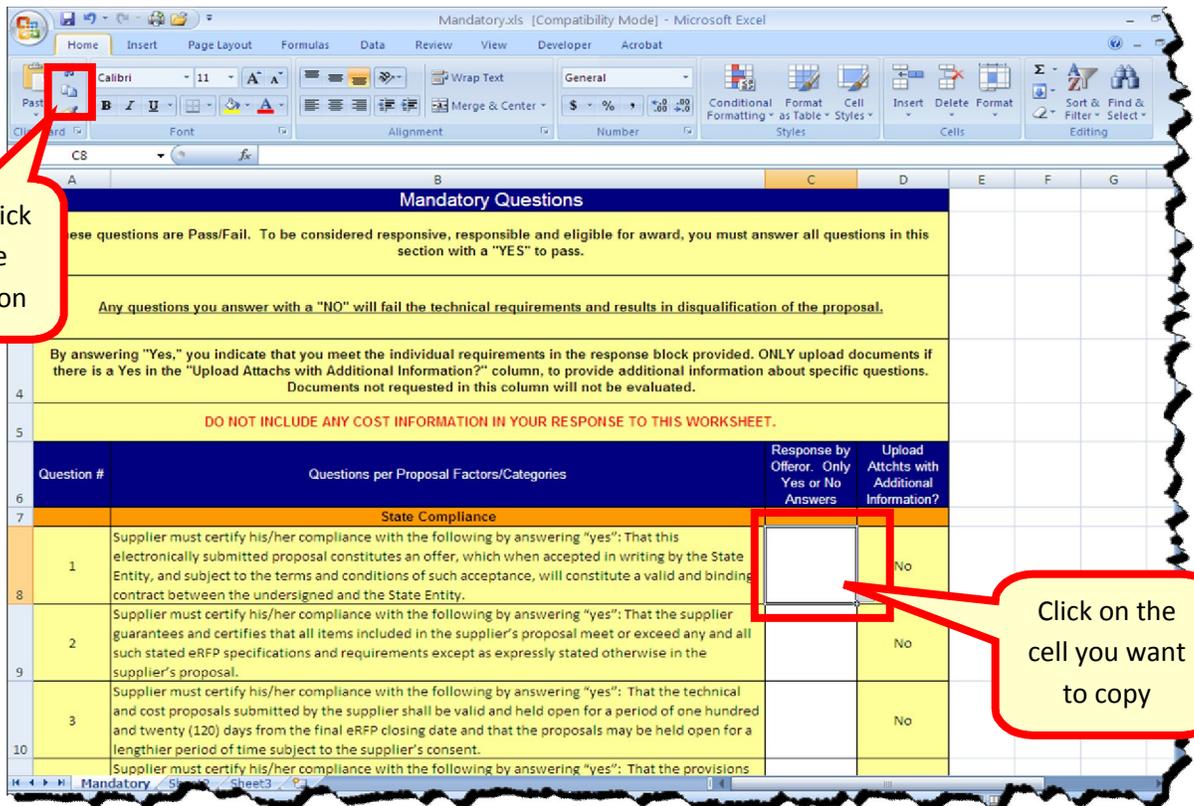
9. Select the cells where you want to copy this cell. Then, click on the Paste icon to paste the cell onto the other cells on your spreadsheet.

Then, click on the Paste icon

Select the cells where you want to copy the Yes/No cell
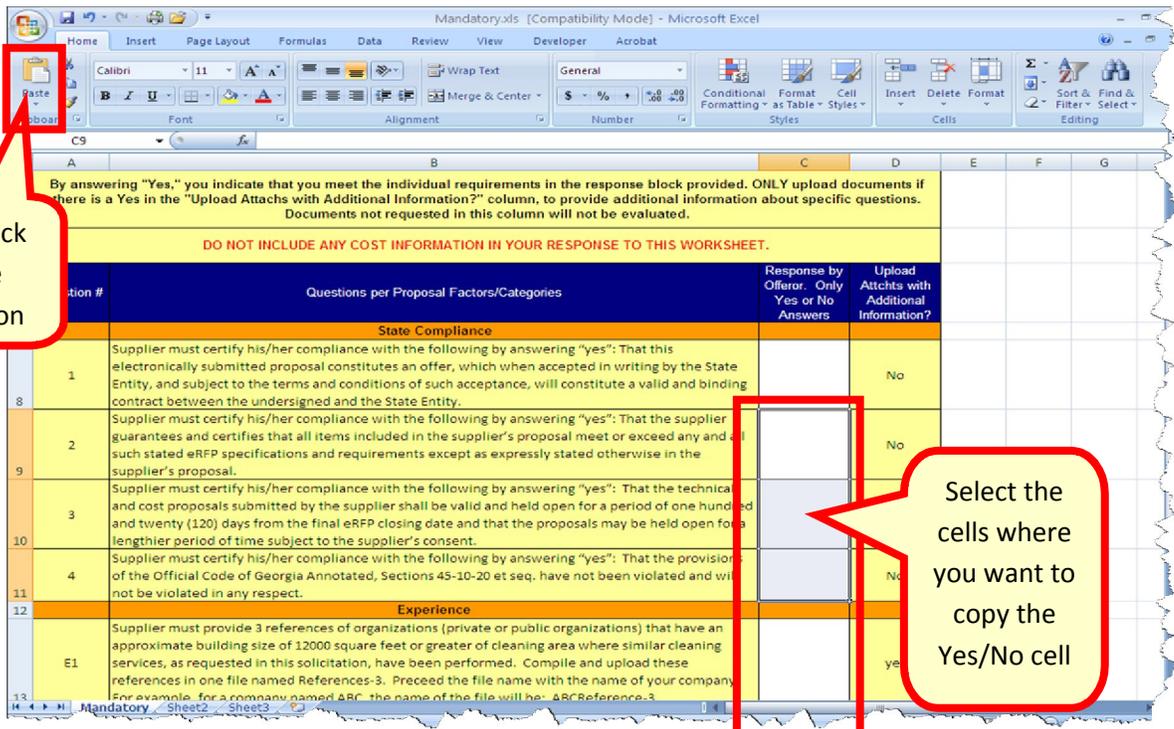
10. Repeat step 9 as many times as needed to copy to the rest of the cells on your spreadsheet.

Protecting the worksheet

1. 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.

2. Highlight the cells (column) where the offeror will respond Yes/No.
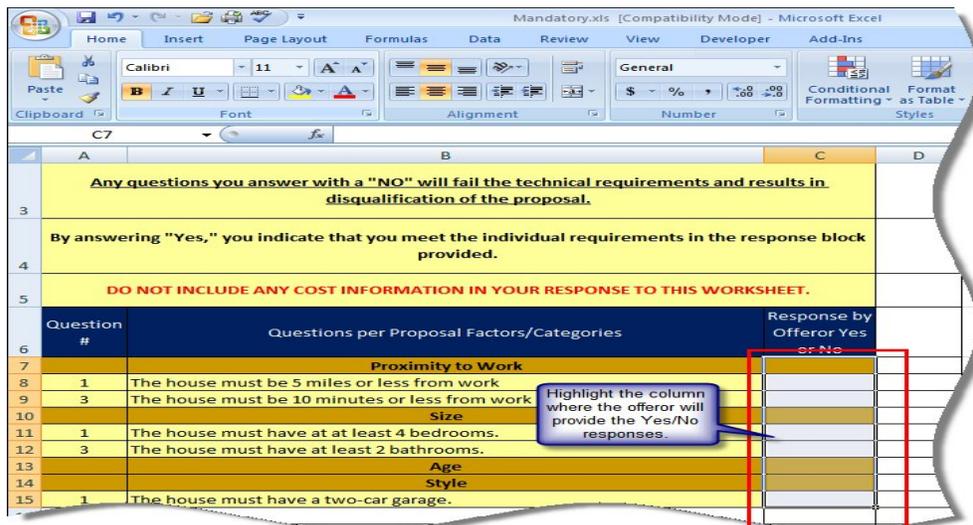
3. Click on the Home tab. Then, click on Format and select Format Cells… from the drop-down list.
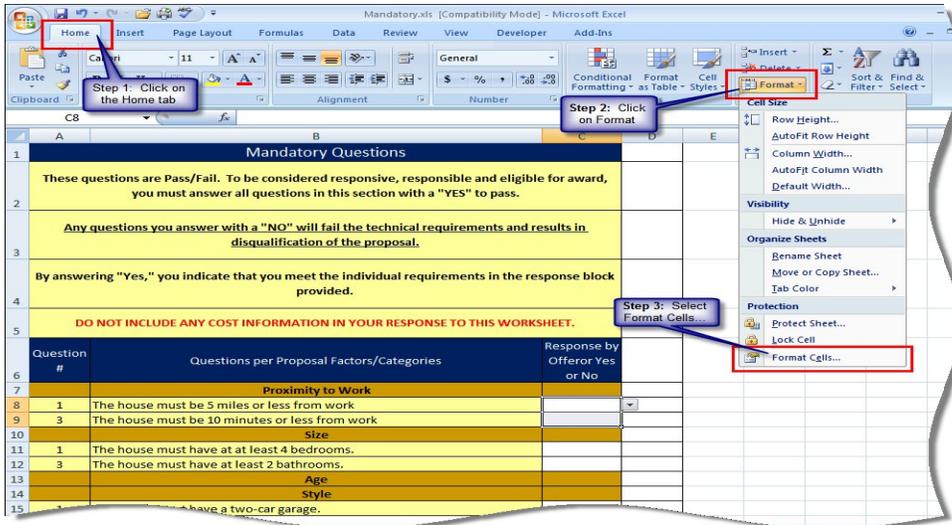
4. Click on the Protection tab. Then, ensure that the Locked field is deselected.
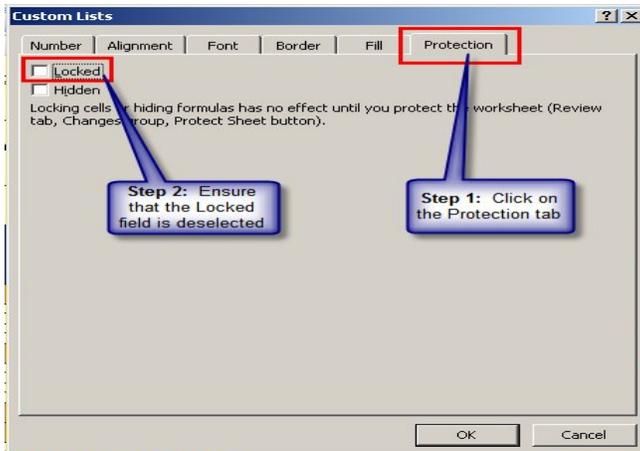
5. To protect the worksheet, click on the Review tab. Then, click on Protect Sheet.
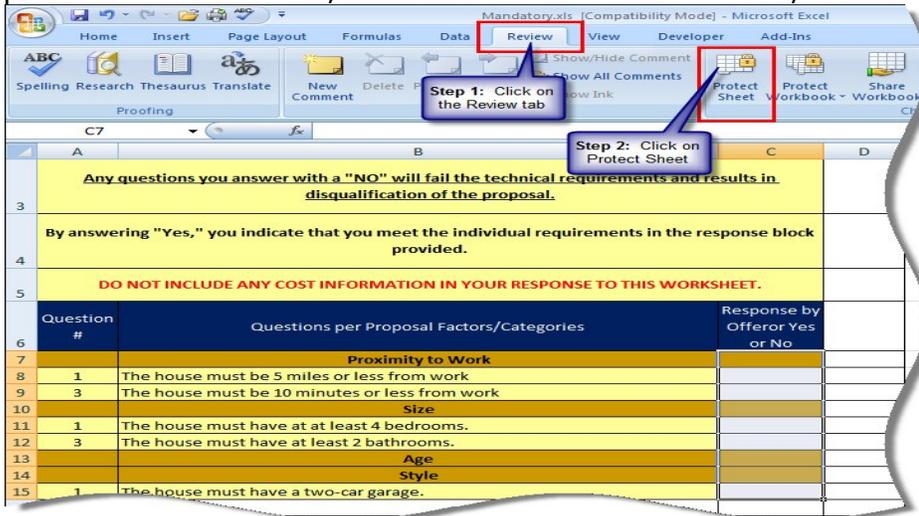
6. When the Protect Sheet dialog box displays, ensure that Protect worksheet and content of locked cells, Select Locked cells, and Select unlocked cells are selected. Then, enter a password that you will be able to remember and click OK.

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

8. 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 the Office Button icon. This is located on the top, left corner of the screen.
    b. Click on Print.

c. Select Print Preview from the drop-down list.
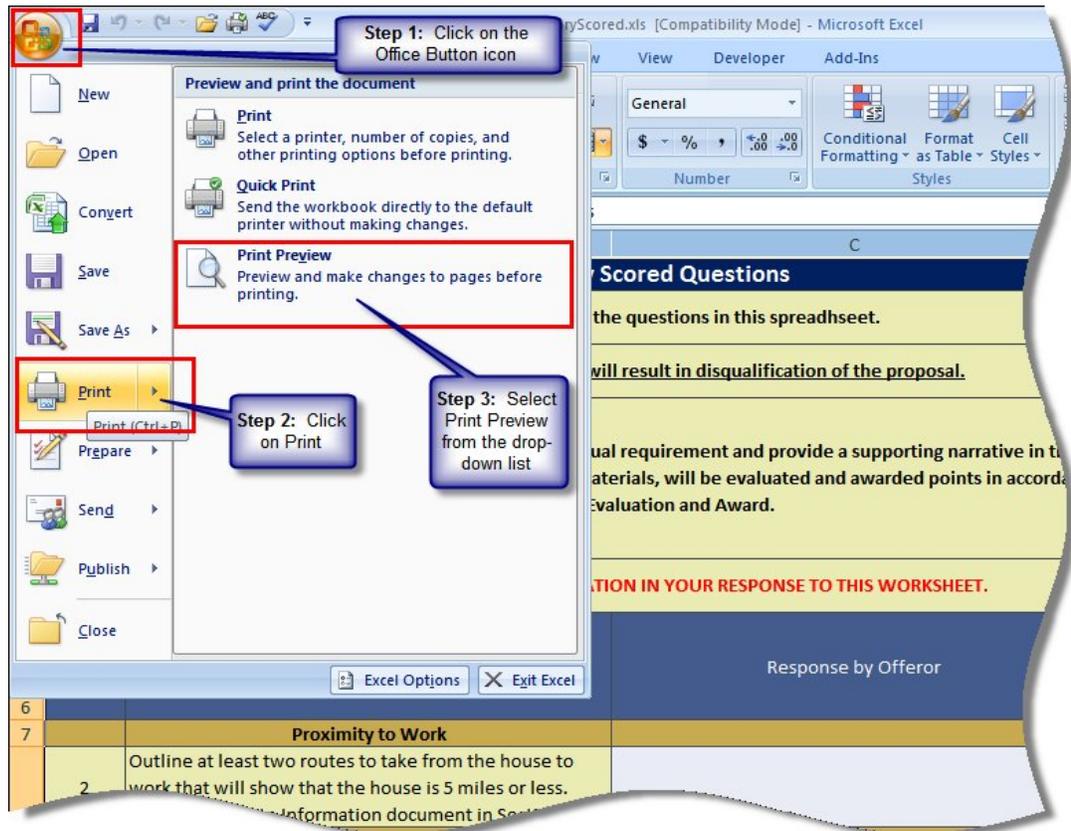
d. Click on the **Page Setup** button.
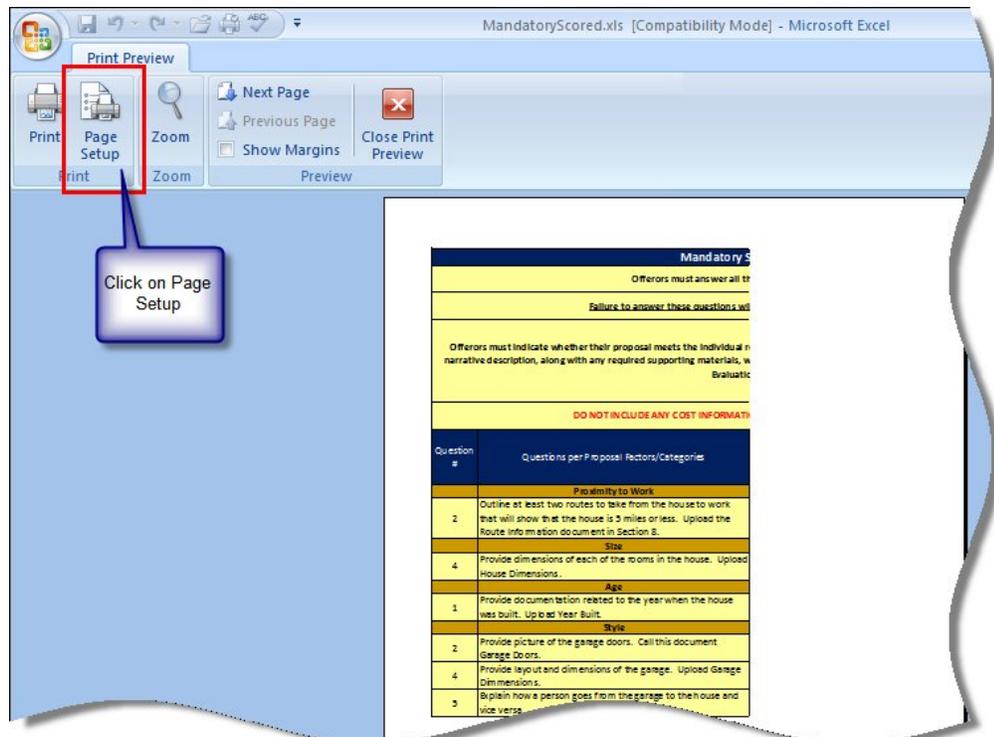
e. Select Landscape. Then, adjust the Scaling to 90%. Then click **OK**.
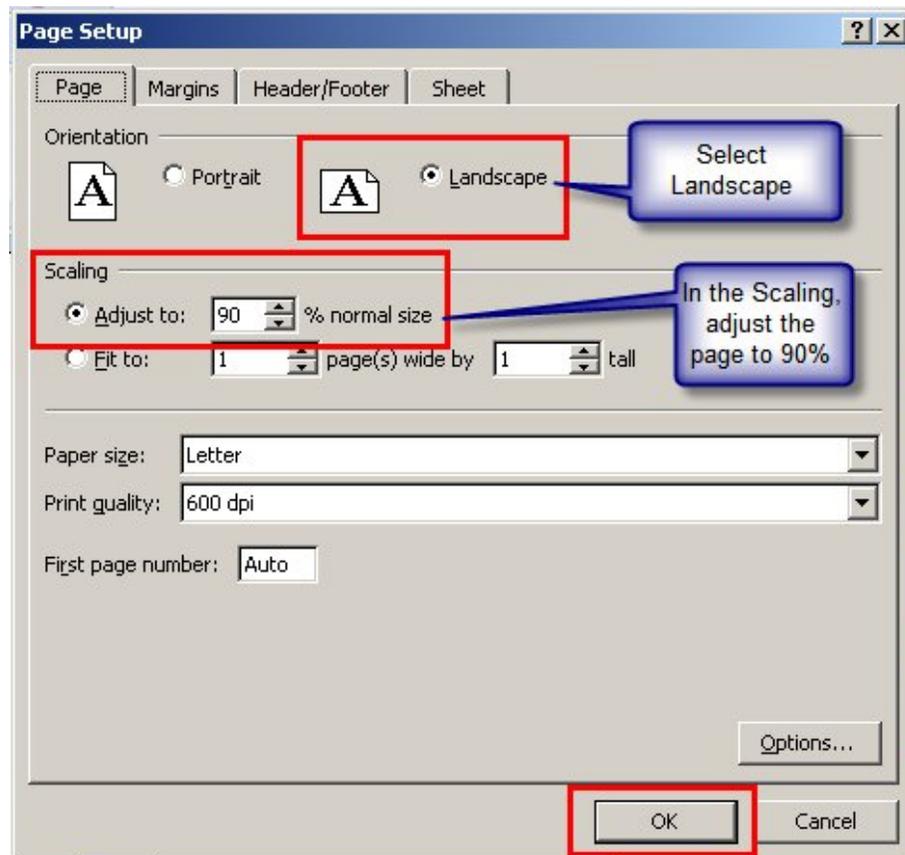
2. Protect the worksheets as you did with the Mandatory worksheet. To do this repeat steps 1 through 7 as indicated in the previous section for the Mandatory Scored and Additional Scored worksheets. Ensure that all your worksheets are protected before you post them.

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**.
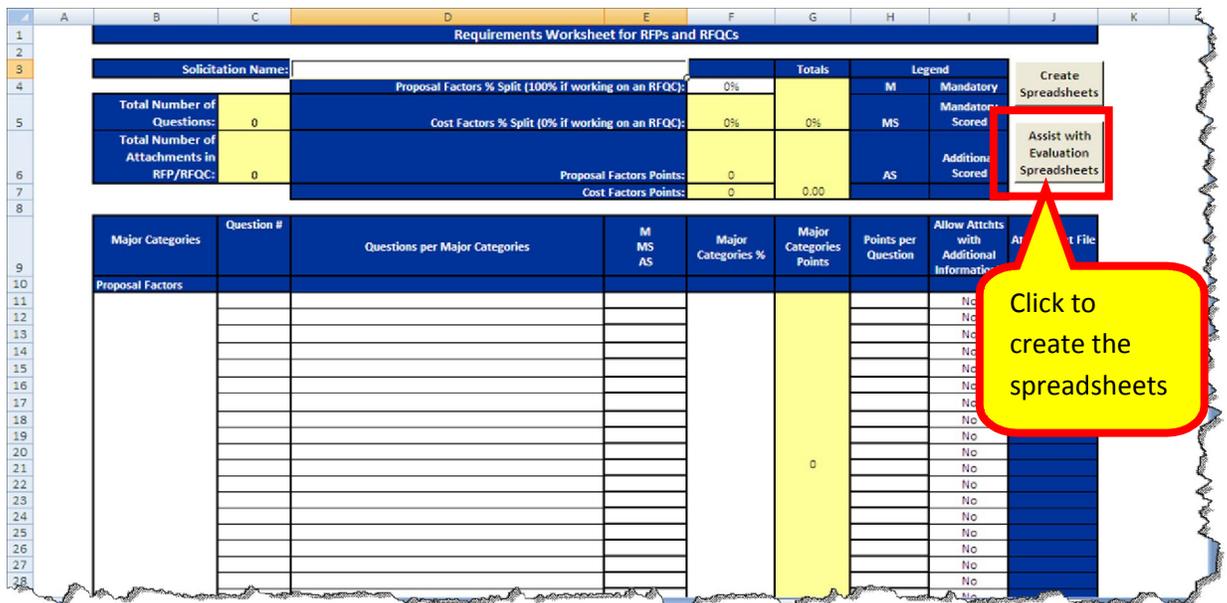
2. The following worksheets are saved on the same folder as the one where the RFP/RFQC Requirements worksheet is located:

- 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.

Q#	Question	Assigned Points
	Mandatory Scored Questions and Points Assigned	
	Use the Information in this Spreadsheet to create the Evaluation Sheets	
State Compliance		
Experience		
Services and Supplies		
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
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. Preceed 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
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. Preceed 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
Customer Services		
1	Provide a description of the procedures that your company follows to resolve customer issues related to performance.	40
2	Provide a description of the procedures that your company follows to resolve customer issues related to resources.	40
3	Provide a description of the procedures that your company follows to resolve customer issues related to equipment.	40
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
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	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							
7	**Services and Supplies**									
8	2	Describe enviromentally 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.