

State of Maine
Master Score Sheet

RFP# 202307151			
Coordination Services: Recovery Coach and Training Services			
Bidder Name:		Healthy Acadia	Sweetser
Proposed Cost:		\$2,510,162.50	\$636,913.52
Scoring Sections	Points Available		
Section I: Preliminary Information	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	35.00	32.00	8.00
Section III: Proposed Services	40.00	37.00	6.00
Section IV: Cost Proposal	25.00	6.34	25.00
TOTAL	<u>100.00</u>	<u>75.34</u>	<u>39.00</u>

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



Maine Department of Health and Human Services
Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Award Justification Statement

RFP# 202307151, Coordination Services; Recovery Coach and Training Services

I. Summary

Through RFP# 202307151, the Department sought proposals for Coordination Services; Recovery Coach and Training Services. Two (2) Bidders responded: Healthy Acadia and Sweetser. Through the evaluation process, Healthy Acadia was the highest scoring Bidder and determined to provide the best value to the State of Maine.

II. Evaluation Process

An evaluation team comprised of State employees, applied the consensus method in scoring the Bidders Qualifications & Experience and Proposed Services. Scores for the Cost Proposal were assigned using a mathematical formula.

III. Qualifications & Experience for Healthy Acadia

- The current statewide provider of these services demonstrating a history of meeting contract deliverables held with the Department as well as experience with managing grants and personnel, convening diverse partnerships, implementing programming, and working within budgets.

IV. Proposed Services for Healthy Acadia

- Has a number of office locations and existing relationships with partner organizations across the state that enabling them to provide coordination services across the state.
- Provided a detailed summary for the Recovery Coaches workforce delivery program requiring Intern Coaches to complete a series of requirements and certifications in order to maintain registration as a Maine Registered Peer Recovery Coach.

V. Cost

Healthy Acadia proposed a cost of \$2,510,162.50.

VI. Conclusion

Out of 100 possible points, Healthy Acadia scored 75.34, which was the highest point total awarded by the Evaluation Team. The strengths of Healthy Acadia's proposal include a strong organization with relevant experience, a complete proposed scope of service, and a competitive cost proposal. The Evaluation Team has determined the proposal submitted by Healthy Acadia represents the best value to the State of Maine.

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TTY: Dial 711 (Maine Relay)

Feb-15-2024

Via Electronic Mail: penny@healthyacadia.org

Healthy Acadia
Penny Guisinger, Recovery Programs Director
75 State Street
Ellsworth, ME 04605

SUBJECT: Notice of Conditional Contract Award under RFP #202307151 Coordination
Services: Recovery Coach and Training Services

Dear Penny Guisinger,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of Behavioral Health. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to:

- Healthy Acadia

Healthy Acadia received the evaluation team's highest ranking. The Department will be contacting Healthy Acadia soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and Healthy Acadia. Healthy Acadia shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

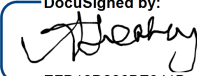
As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract.

Any person aggrieved by this award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).

Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

EFD18D286BE941B...

Adrienne Leahey
Chief Operating Officer
Office of Behavioral Health

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



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Feb-15-2024

Via Electronic Mail: mtausek@sweetser.org

Sweetser
Michael Tausek, Director- Recovery Services
50 Moody Street
Saco, ME 04072

SUBJECT: Notice of Conditional Contract Award under RFP #202307151 Coordination
Services: Recovery Coach and Training Services

Dear Michael Tausek,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of Behavioral Health. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to:

- Healthy Acadia

Healthy Acadia received the evaluation team's highest ranking. The Department will be contacting Healthy Acadia soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and Healthy Acadia. Healthy Acadia shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

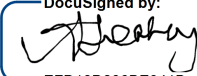
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Sincerely,

DocuSigned by:

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Adrienne Leahey
Chief Operating Officer
Office of Behavioral Health

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Kenney Miller, Anna Ko, Mike Freysinger, Mindy Smith, Lorrie Mitchell, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	32.00
Section III. Proposed Services	40.00	37.00
Section IV. Cost Proposal	25.00	6.34
<u>Total Points</u>	<u>100.00</u>	<u>75.34</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	32.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience

1. Overview of the Organization

- A 501(c)(3) nonprofit organization founded in 2001.
- Is the current incumbent for these services.
- Substance Prevention and Recovery, Strong Beginnings, Healthy Aging, Active and Healthy Environments, Healthy Food for All, and Health Promotion and Management.
- Demonstrated history of meeting contract deliverables held with the Department as well as experience with managing grants and personnel, convening diverse partnerships, implementing programming, and working within budgets.
- Providing peer Recovery Coaching services to individuals with substance use disorder (SUD) since 2017 via State of Maine contract of across Washington and Hancock Counties.
- The Maine Alliance for Recovery Coaching program has successfully exceeded contract deliverables every year since 2017 including expansion of services to five (5) total counties.
- Recovery Coaching trainers have trained 605 peer coaches across the State since becoming CCAR-registered trainers in 2016.
- Launched Maine RecoveryCorps in 2018 initially as an AmeriCorps program - onboarded, trained, and deployed recovery coaches across the State.
- Now funded by the State of Maine, Maine Recovery Core has 19 individuals serving as interns providing peer support across five (5) counties.
- History of collaboration with Maine Tribal Health agencies.
- Formed an internal Health Equity Team in 2020 to examine their policies, practices and programs through a DEI lens. They are currently in the process of finalizing their first Health Equity Strategic Plan for the organization.
- Experience in managing multiple federal grants in support of recovery-related programs.
 - SAMHSA MAT Expansion Grant 2018 – 2021.
 - HRSA Rural Health Opioid Program (RHOP) grant 2017 – 2020.
 - Rural Community Opioid Response Project (RCORP).

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

- | |
|--|
| <ul style="list-style-type: none">• Provided three (3) highly relevant project examples.<ul style="list-style-type: none">○ Project 1 - Maine Recovery Core/ Maine Alliance for Recovery Coaching.○ Project 2 - Inspire Recovery Community Center and Warming Center.○ Project 3 - Safe Harbor - Recovery Residence for Women and Children opened in 2020. |
|--|

2. Subcontractors

- | |
|--|
| <ul style="list-style-type: none">• None |
|--|

3. Organizational Chart

- | |
|---|
| <ul style="list-style-type: none">• Provided a detailed organizational chart. |
|---|

4. Litigation

- | |
|---|
| <ul style="list-style-type: none">• Indicated none. |
|---|

5. Financial Viability

- | |
|--|
| <ul style="list-style-type: none">• Included three (3) years of audited financial reports. |
|--|

6. Certificate of Insurance

- | |
|--|
| <ul style="list-style-type: none">• Provided a valid certificate of insurance. |
|--|

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	37.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none">• Indicates a primary office location in Ellsworth and one satellite office in Machias.• A number of additional office locations and relationships with partner organizations that will enable coordination services to be provide across the State.• Operate during regular business hours M-F 8am-5pm.
B. Information Technology Requirements
<ul style="list-style-type: none">• Plans to utilize Department-approved tracking tools such as the Recovery Coach Tracking Sheet, Coordinator Tracking Sheet, and Connecticut Community for Addiction Recovery (CCAR) Training Tracking Sheet.• Plans to utilize Recovery Data Platform (RDP) for data collection. RDP is part of a cloud-based platform called Salesforce is compliant with HHS requirements.• RDP is compliant with the requirements set by the State's Information Technology Policies.• Will ensure that all of their other IT-related tools, including our social media, newsletters, internal website, external website, are in compliance with these policies.• Stated that RDP is compliant with NIST 800-53 Rev 5 and will continue to be compliant into the future.• Did not address physical/facility-related items in the list (e.g., physical and environmental protection).• As the current incumbent there will be no interruption of service or transfer of data to a new system.
C. Coordination and Collaboration
<ul style="list-style-type: none">• Plans to maintain connection with Statewide partners.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

- Plan to expand to include new partners by collaborating with current and emerging Recovery Centers and the Statewide Hub to engage those that are interested specifically in coaching others by being a community volunteer.
- Will expand volunteer recruitment and management, fine tune internal process and Volunteer Form for those interested in volunteering and update written guidance.
- Plans to deepen the connection between Maine Recovery Core (MRC) Interns and community recruitment by adding recruitment to Interns responsibilities.
- Plans to add formal recruitment opportunities to Recovery Coach trainings.
- Plans to expand referral opportunities with partners in 10 counties.
- Will utilize media and social media outlets such as: Facebook, Instagram, Twitter, Discord, newsletters, Journey magazine and our monthly Recovery Coaching Column.
- Will expand on current locations to meet emerging needs.
- Plans to use written guidance and processes for Coachers/Visors to ensure quality supervision sessions. Processes include written agendas, guidance for group working agreements, tracking sheets for attendance, calendar offerings, and technical assistance and support.
- Plans to network with over two-hundred (200) community partners.
- Maine-ARC plans to expand their work with all Statewide partners, the hub, and recovery support centers to offer technical assistance.
- Response lacked specific details on how implementation of RCS would be accomplished.
- GPRA administration, tracking, and monitoring will be absorbed into the workflow of coaches and Coordinators; Plans to meet deliverable on day 1.
- Will employ a system of engagement, protocols, and processes to recruit community volunteers to include the screening and training of volunteers, coach onboarding, high quality matching and referral process, ongoing education, and a system of engagement between coaches and recoverees or affected others, including the collection of data.

D. Core Knowledge Training, Supervision, and Workforce Development

- Included a calendar of trainings.
- Indicated four (4) CCAR training facilitators on staff.
- Five (5) total staff with Recovery Coach Professional Facilitators (RCP-F) and two (2) that hold Recovery Coach Professional (RCP) designations.
- CoacherVision to be offered multiple times each month.
- System of matching coaches to recoverees by following written guidance and procedure in the Recovery Coach Coordinator Handbook.
- Includes monthly sample schedule of group, one on one, and 'pop-up' (CoacherVision sessions are scheduled as needed).

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

- Plans to utilize a written agenda and guidance for CoacherVision sessions, with a working agreement developed by the group that is reviewed at each session.
- Co-directors plan to develop an internal training program for new facilitators, slowly integrating them into the training schedule as capacity allows.
- Demonstrated experience providing CCAR training.
- Paid internship program to recruit, place, train, and supervise coaches across 10 counties.
- Provided a highly detailed program requiring Intern Coaches to complete a series of requirements and certifications in order to maintain registration as a Maine Registered Peer Recovery Coach.
- Intern Coaches will be provided with laptops and cell phones and have access to support from Healthy Acadia's Technology Manager.
- Included a list of numerous host site partners.
- Intern Coaches will have access to a Friday Help Desk, a 2.5 hour session for open questions.
- Internship program contains a mentor/mentee program, for those interested.

E. Programmatic Quality Assurance and Technical Assistance (TA)

- Will provided written protocols for continuous follow-up and quality assurance, which include a process for Assessment of Recovery Capital.
- Plans to utilize the Brief Assessment of Recovery Capital (BARC), a high quality Assessment of Recovery Capital that can be used to support an individual's recovery process by focusing on their strengths and resources throughout various phases of treatment and recovery and highlighting areas of focus for them.
- Will support recoverees in multiple settings such as jails, treatment courts, pre-release centers, and recovery centers, who serve a high-risk population.
- Will also serve individuals that have recently overdosed through referrals from OPTIONS, The INSPIRE Recovery Center, EMS, MDI Hospital, law enforcement, Project Hope, Intensive Case Managers, and more.
- Stated that individuals identified as high acuity and/or at particular risk are connected immediately to their Recovery Coach system and often have their first meeting with their program staff in the moment, at the point of contact or service. Stated that it is their goal to codify these processes with written protocols early in the new year, and they will share them with the Department for discussion and approval prior to finalizing.
- Plans to facilitate 1.5 hr./week meeting to provide TA to Recovery Coach Coordinators.
- MRC offers support, technical assistance, education, and workforce development.
- MRC Director and MRC Coordinator offer monthly TA sessions and supervision which is mandatory.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

<ul style="list-style-type: none"> Will respond daily for all requests for TA.
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none"> Plan to include reference and background checks, county to be served, and status of coaching in the Recovery Coaches records. Plans to track recoveree data using RDP. Plans to utilize policies developed using evidence-based models as template. All coaches and staff trained on utilization of written policy guide. Will be utilizing a pre-approved Department excel spreadsheet housed in a private, protected, HIPAA-compliant Google drive. Exceeds requirements planning to collect contact information, source of referral, and key dates.
G. Staffing Requirements
<ul style="list-style-type: none"> Co-Directors are certified CCAR facilitators since October 2016. Plans to employ a minimum of five (5) recovery coach coordinators through direct hire.
H. Reports
<ul style="list-style-type: none"> Met the requirements.
2. Staffing
<ul style="list-style-type: none"> Administrative Coordinator (AC) for MARC and MRC de-emphasizes formal educational experience, allowing the position to be more open to individuals with Lived Experience. RC Internship for MRC job description, Bidder stated that the individual must identify as having Lived Experience in Recovery and identifies as a peer. For all job descriptions, aside from Recovery Coach (RC) Internship for MRC, Bidder included that "experience in personal addiction recovery, or a strong demonstrated personal experience with the recovery process" is preferred/highly recommended. Plans to use 10.5 FTE.
3. Implementation - Work Plan
<ul style="list-style-type: none"> Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Healthy Acadia

DATE: February 5 & 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$636,913.52	÷	\$2,510,162.50	x	25.00 points	=	6.34

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Kenney Miller, Anna Ko, Mike Freysinger, Mindy Smith, Lorrie Mitchell, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	8.00
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<u>Total Points</u>	<u>100.00</u>	<u>39.00</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	8.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Founded in 1828 - providing peer directed recovery services since 2001.• Provides peer support to individuals receiving Behavioral Health Home (BHH) and Acute Community Treatment (ACT) services in 8 communities.• Provided three (3) project examples somewhat related to the requested services.<ul style="list-style-type: none">○ Project 1 - Peer Support Line○ Project 2 - Intentional Peer Support in the Emergency Department.○ Project 3 - CCBHC - federal Substance Abuse and Mental Health Services Administration (SAMHSA).• Did not provide examples demonstrating experience with substance misuse treatment or recovery coaching.• Established Consumer Advisory Board to reflect the real needs of consumers and family members.• Indicates plan for expansion of Peer services as part of the Certified Behavioral Health Clinic (CCBHC) model.• Indicates success implementing and managing peer recovery services across multiple programs engaging in personal change theory, multiple pathways to recovery, and community engagement.
2. Subcontractors
<ul style="list-style-type: none">• Meghann Perry Group, CCAR Certified trainer of Recovery Coaching to provide training for staffing requirements.
3. Organizational Chart
<ul style="list-style-type: none">• Provided two (2) org charts, one (1) covering overview of leadership and one (1) covering Recovery Services.• Recovery Services project organizational chart indicates a position for recovery coach trainer and six (6) recovery center locations with recovery coach coordinators and recovery coaching staff associated with each. It is unclear if or how these centers are related to the services in this RFP.
4. Litigation

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

<ul style="list-style-type: none">• Provided a list of past and current litigation. Some litigation disclosed is concerning to the Evaluation team.
5. Financial Viability
<ul style="list-style-type: none">• Audited financial submitted for years 2019-2020, 2020-2021, and 2021-2022 appear to indicate financial viability.
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided and current at time of submission.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	6.00

Evaluation Team Comments:

Throughout the proposal, Sweetser indicates only providing services for the Target Areas in which Sweetser is awarded under RFP 202306142 Recovery Support Centers Services. The services under this RFP 202307151 Coordination Services: Recovery Coach and Training Services are Statewide services with only one (1) award. The awarded Bidder under this RFP 202307151 is expected to provide services to all nine (9) Target Areas awarded under RFP 202306142.

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none"> For “each awarded location”, services will be made available Monday through Friday, 8a.m. to 5p.m. local time, except holidays and administrative closings. On average, locations will be open 225 days a year.
B. Information Technology Requirements
<ul style="list-style-type: none"> “Each awarded location” will implement a Department-approved tool (e.g., Excel spreadsheet) to track individual certification, including but not limited to enrollments, certifications, recertifications and other required continuing education requirement. Proposed tracking tool will be protected by their organization’s IT server with limited access to staff. Did not address the client and management system being provided or maintained within 30 calendar days of the Initial Period of Performance. “Each awarded location” will comply with all applicable MaineIT policies as well as maintain compliance with its own policies and procedures regarding system management and serviceability. Provided a detailed description of how NIST 800-53 Rev 5 requirements will be met. Did not address ensuring a smooth transition such that there is no (or negligible) interruption in service
C. Coordination and Collaboration

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

- Communication and Collaboration plan does not discuss how working relationships, protocols, and systems for referral and engagement with volunteer and paid recovery coaches will be established.
- Indicates experience serving as the provider of the Peer Training Network.
- Offers no specifics on practical implementation.
- Plans to establish a timeline but offers no details or timeline.
- “Each location’s mission” will reflect a commitment to collaborate; did not specifically describe how they would coordinate scheduling with RCS locations and community partners to implement RCS.
- Addresses ‘scaling up’ through staff recruiting.
- Indicates local centers will collaborate with local community partners through the sharing of training and certification information.
- References using social media platforms to raise awareness, citing their role as the provider of the peer training network. However, the most recent social media post regarding the Peer Training Network (PTN) was in 2017.
- Did not provide a description of process for developing a coordination and referral process.
- Did not indicate completing the GPRA Deliverable Checklist within 30 days of provision of services.

D. Core Knowledge Training, Supervision, and Workforce Development

- Did not provide the methods or resources to be used to ensure recovery coaches complete the CCAR RCA prior to delivering RCS, complete or enroll in CCAR ECRC, or participate in ongoing Recovery Coach training.
- It is unclear if they plan to provide CoacherVision via online or hybrid modalities as well, or if they will only be providing CoacherVision in person.
- Indicates only four trainings will be offered.
- Training and supervision plan lacks detail, states supervision philosophy but does not adequately describe how supervision will be provided.
- Did not describe developing CoacherVision locations/environments as specific needs emerge.
- Stated CoacherVision will be offered on a weekly basis however, in the Training and Supervision Plan they stated Coach Coordinators would provide CoacherVision on a monthly basis.
- Response does not address affected others.
- Did not address ensuring each Recovery Coach conducts initial placement meetings with potential Recovees, ensuring quality of intake and screening processes; Only addressed the initial meeting with potential Recovees, not the initial placement meeting.
- “Awarded locations” will maintain robust and consistent training programs.
- Only referred to provision of CART programming information and updates, it is unclear if they would provide CART program training agreed upon with the Department as well, as required.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

<ul style="list-style-type: none"> • Did not address provision of hybrid and/or online training (aside from CCAR ECRC), should any anticipated locations not be awarded, in order to ensure access to statewide training. • Proposed training reference in this section is unrealistic – RCA is a 30-hour training, and they indicate each location will offer it twice each month, in addition to the other trainings, offered multiple times each month at each location. Total in-person training listed add up to 116 hours per month. • Did not address Recovery Coaching in the Emergency Department. • Includes reference to a bi-weekly training “CCAR RCP”. It is unclear what RCP stands for. • Did not indicate the resources or methods necessary to deliver these trainings. • Participants will have access to job openings for recovery coaches and grants funding for additional training. • Lacks detail beyond providing training.
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • Plans to develop protocols to specifically address needs of individuals at high risk of opioid overdose. • Will implement system of evaluation and continuous improvement. • References to "certified individuals", is unclear who this is referring to.
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none"> • Minimally responsive to providing data to inform the Department of outcome measurements. • Did not address creating and implementing written policy and procedure regarding the use and maintenance of equipment and documenting training of Recovery Coaches in all applicable requirements regarding confidentiality. • Did not address creating and maintaining Recoveree records that include a brief summary of all contacts and a list of contacts with the RCS provider and/or community providers.
G. Staffing Requirements
<ul style="list-style-type: none"> • Indicates staff necessary to deliver services will not be in place until at least the second quarter of the contract term.
H. Reports
<ul style="list-style-type: none"> • Met the requirements.
2. Staffing
<ul style="list-style-type: none"> • Job descriptions for Recovery Coach Trainer and Coach Coordinator positions both require Lived Experience with the process of Recovery from trauma and SUD and is willing to self-identify with peers on this basis in the community. • Provided job descriptions for 8 different positions. • Recovery Coach description indicates that they supervise volunteers. • Did not address oversight and management of their subcontractor.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER: Sweetser

DATE: February 5 & 9, 2024

- Staffing plan does not match the 8a-5p requirement for accessibility as outlined in Part A.
- Did not include a description on how proposed minimum staffing requirements/qualifications will be met.
- Staffing plan only includes two (2) FTE Recovery Coach Coordinators and one (1) "CCAR RCA Trainer"; however, the RFP requires the Bidder to employ and/or subcontract a minimum of two (2) staff certified by CCAR to facilitate RCA and ECRC; and a minimum of five (5) Recovery Coach Coordinators who are certified CoacherVision facilitators. Previously stated they would subcontract two trainers and hire five Coach Coordinators.
- The proposed staffing plan is unclear and conflicts with other information provided in their response.
- Provided is a sample weekly coverage chart including only three (3) positions. It is unclear how the other positions whose job descriptions were included in attachment 9 are related.

3. Implementation - Work Plan

- Implementation plan is written in a timeline using "prior to start date", "month 1", "Month 2", and so on, making it difficult to determine the planned start and completion date for the tasks included.
- Plan indicates RSC open in month 3. It is unclear if this indicates a 3-month gap in training and recovery coach coordination services.
- Plan indicates integration into Recovery Support Center operations during months 2 and 3. It is unclear what the impact on this proposal if the Bidder is not awarded to provide center service in one or more locations.
- Plan does not address providing coaching services.
- Plan does not address providing recovery coaching training outside of staff training.
- Did not include in the workplan that written policies and procedures would be submitted to the Department for approval within ten business days of contract start date.
- Stated in their proposal that they would have to hire five Center Coordinators and subcontract for two training staff, this task was not included in the work plan, and it is unclear when the Bidder intends to be fully staffed and able to provide services.
- Did not delineate work to be completed by the subcontractor.
- Included minimal program development and implementation tasks; most tasks listed were ongoing.

**STATE OF MAINE
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**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$636,913.52	÷	\$636,913.52	x	25.00 points	=	25.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 2/1/24

EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience

1. Overview of the Organization

- a 501(c)(3) nonprofit organization founded in 2001
- focus areas: Substance Prevention and Recovery, Strong Beginnings, Healthy Aging, Active and Healthy Environments, Healthy Food for All, and Health Promotion and Management
- experience with managing grants and personnel, convening diverse partnerships, implementing programming, tracking progress, reporting on deliverables, conducting evaluation processes, and working within budgets
- providing peer Recovery Coaching services to individuals with substance use disorder (SUD) since 2017 via State of Maine contract of across Washington and Hancock Counties.
- The Maine Alliance for Recovery Coaching program has successfully exceeded contract deliverables every year since 2017 including expansion of services to 5 total counties
- Recovery Coaching trainers Terri Woodruff and Denise Black have trained 605 peer coaches across the state of Maine since becoming CCAR-registered trainers in 2016.
- launched Maine RecoveryCorps in 2018 initially as an AmeriCorps program – onboarded, trained, and deployed recovery coaches across the State
- Now funded by the State of Maine, Maine Recovery Core has 19 individuals serving as interns providing peer support across five counties
- Success managing multiple federal grants in support of recovery-related programs.
 - SAMHSA MAT Expansion Grant 2018 - 2021, Downeast Treatment Center in Ellsworth to fund treatment for uninsured or underinsured individuals and provide training for clinicians across the state.

**STATE OF MAINE
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EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

- HRSA Rural Health Opioid Program (RHOP) grant 2017 – 2020, wide variety of recovery-focused activities including launching Project HOPE in Ellsworth, creating linkages between jails and providers, providing broad community education, and increasing care coordination across multiple systems.
- Rural Community Opioid Response Project (RCORP), Current, increasing community awareness of SUD, reducing stigma, providing care navigation for individuals, promoting harm reduction, and continuing to support coalitions in both Washington and Hancock Counties.
- PROSPER (Pre/Peri/Post-natal and Parenting Resources and Other Support Systems for Pregnant Women/Families Engaging in Recovery) Project, current, working with women with SUD who are either pregnant or parenting by providing them with specially trained navigators who support them as they make plans, set goals, and overcome obstacles. Includes a Tribal PROSPER Navigator who serves as a bridge between the tribal and non-tribal communities and has helped to build trust, expand awareness, conduct culturally competent outreach, and address specific experiences of tribal mothers and families.
- Established Health Equity Team in 2020 to examine policies, practices, and programs through a DEI lens. in the process of finalizing first Health Equity Strategic Plan for the organization.
- Recently provided 2 trainings (one in Ellsworth and one on Indian Township) called "Strengthening Relationships with Cultural Competency: Increasing Understanding of the Passamaquoddy Tribe,"
- Recently added a Community Outreach and Equity Coordinator who works closely with partners Mano en Mano.
- Several staff currently completing Certified Intentional Peer Support Program to better meet the needs of participants served at Inspire Recovery Community Center
- Project 1 - Maine Recovery Core/ Maine Alliance for Recovery Coaching - interconnected programs that provide for the training and coordination of individuals to become Recovery Coaches
- Many individuals are current or former support service consumers
- has supported over 100 members/interns, many of whom have moved on to higher level positions within bidder's organization and host organizations
- Project 2 – Inspire Recovery Community Center and Warming Center – state funding pilot to open a recovery center in July, 2021.

**STATE OF MAINE
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EVALUATOR DEPARTMENT: OBH

- leveraged additional funding sources to provide additional staffing to support programming and peer support services.
- Serves +/- 2000 consumers annually.
- focus evolved from SUD recovery to serving an increasing number of individuals identifying with SMI.
- Opened warming center after hours at Recovery Center to better meet participants' needs
- Project 3 – Safe Harbor - Recovery Residence for Women and Children opened in 2020.
- provides a safe living environment and a wraparound approach to support women with substance use disorder as they navigate recovery, access systems of care, and work toward permanent housing and health.
- the only MARR-certified residence in Washington County and one of the only residences in Maine that houses children

2. Subcontractors

- None

3. Organizational Chart

- Enterprise org chart provided which includes project

4. Litigation

- None

5. Financial Viability

- Included 3 years of audited financials that indicate financial viability

6. Certificate of Insurance

- Provided and current

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none">Indicates 1 primary office location in Ellsworth and one satellite office in Maciasa number of additional office locations and relationships with partner organizations across the state that enable bidder to provide coordination services across the stateoperate during regular business hours M-F 8am-5pm
B. Information Technology Requirements
<ul style="list-style-type: none">Commitment to continue using Department-approved tracking tools such as the Recovery Coach Tracking Sheet, Coordinator Tracking Sheet, and CCAR Training Tracking Sheet.Uses Recovery Data Platform (RDP) for data collection. RDP is part of a cloud-based platform called Salesforce is compliant with HHS requirements
<ul style="list-style-type: none">RDP is compliant with the requirements set by the State's Information Technology Policieswill ensure that all of our other IT-related tools, including our social media, newsletters, internal website, external website, are in compliance with these policies.
<ul style="list-style-type: none">RDP is compliant with NIST 800-53 Rev 5
<ul style="list-style-type: none">Indicates history of successfully submitting information to the department to demonstrate compliance with require policies
<ul style="list-style-type: none">RDP data will be stored as required within the United States.
<ul style="list-style-type: none">RDP is backed up every 24 hours at the minimum
<ul style="list-style-type: none">Salesforce is the largest data storage and cloud computing organization in the US and world.RDP is never down.in the event of a shutdown or other technological outage, Salesforce is prepared to restore service within 24 hours.
<ul style="list-style-type: none">There are no planned outages of RDP.In the event that there is to be a planned outage, bidder will coordinate with the Department and programmatic partnersDowntime due to routine maintenance will not occur without approval in writing from the Department.
<ul style="list-style-type: none">According to information available from Salesforce, RDP has provided 99.9+ percent of uptime

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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EVALUATOR DEPARTMENT: OBH

<ul style="list-style-type: none"> RDP has the capability to provide an annual full SSAE16 SOC 2 Type 2 annual audit to the Department.
<ul style="list-style-type: none"> Current provider – no transition/migration of data needed is awarded
<ul style="list-style-type: none"> met
C. Coordination and Collaboration
<ul style="list-style-type: none"> programming is strongly connected to a variety of communities and statewide partners plan to expand to include new partners by collaborating with Current and emerging Recovery Centers and the Statewide Hub to engage those that are interested specifically in coaching others by being a community volunteer will expansion volunteer recruitment and management, fine tune internal process and Volunteer Form for those interested in volunteering and update written guidance. will deepen the connection between MRC Interns and community recruitment by adding recruitment to Interns responsibilities will add formal recruitment opportunities to Recovery Coach trainings will expand referral opportunities with partners in 10 counties will continue media and social media outlets such as: Facebook, Instagram, Twitter, Discord, newsletters, Journey magazine and our monthly Recovery Coaching Column
<ul style="list-style-type: none"> Has been delivering CoacherVision since 2018 Will expand on current locations to meet emerging needs Has developed written guidance and processes for CoacherVisors to ensure quality supervision sessions. Processes written agendas, guidance for group working agreements, tracking sheets for attendance, calendar offerings, and technical assistance and support
<ul style="list-style-type: none">
<ul style="list-style-type: none">
<ul style="list-style-type: none">
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none"> Indicates experience training 1,482 people in multiple CCAR trainings Includes calendar of trainings Indicates 4 CCAR training facilitators on staff
<ul style="list-style-type: none"> CoverVision to be offered multiple times each month system of matching coaches to recoverees by following written guidance and procedure in the <i>Recovery Coach Coordinator Handbook</i>.
<ul style="list-style-type: none"> Includes monthly sample schedule of group CocherVision schedule

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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EVALUATOR DEPARTMENT: OBH

<ul style="list-style-type: none"> • 'pop-up' CocherVision sessions are scheduled as needed
<ul style="list-style-type: none"> • Indicates successful history of offering many CCAR trainings • Indicates planning to increase capacity to respond to increased requests for training
<ul style="list-style-type: none"> • Paid internship program recruits, places, trains, and supervises coaches across 10 counties • Intern Coaches are required to: <ul style="list-style-type: none"> ➤ complete RCA, Ethical Considerations for Recovery Coaching, and Recovery Coaching and Professionalism; ➤ maintain a Maine Registered Peer Recovery Coach Certificate; ➤ participate in monthly TA and skill-building sessions; ➤ attend monthly CocherVision; attend monthly full recovery team meetings held by bidder; ➤ participate in one-on-one monthly supervision with the MRC Coordinator and Program Director; ➤ follow work plans established by coordinators; ➤ and participate in annual evaluations • Intern Coaches are provided with laptops and cell phones and have access to support from Healthy Acadia's Technology Manager • Included a list of numerous host site partners
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • written protocols for continuous follow-up and quality assurance, which include a process for Assessment of Recovery Capital; • specifically, the Brief Assessment of Recovery Capital (BARC), a high quality Assessment of Recovery Capital that can be used to support an individual's recovery process by focusing on their strengths and resources throughout various phases of treatment and recovery, and highlighting areas of focus for them. • Successful experience working in multiple settings such as jails, treatment courts, pre-release centers, and recovery centers, who serve a high-risk population. • Also serve individuals that have recently overdosed through referrals from OPTIONS, The INSPIRE Recovery Center, EMS, MDI Hospital, law enforcement, Project Hope, Intensive Case Managers, and more
<ul style="list-style-type: none"> • Met
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none"> • met

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<ul style="list-style-type: none">• Currently utilizing Dept approved tracking tool• Will review with Dept for ongoing approval
<ul style="list-style-type: none">• Met
<ul style="list-style-type: none">• Will track recoveree data using RDP• successful history of reporting, compliance and implementing policies with state and federal partners
<ul style="list-style-type: none">• Existing policies developed by bidder using evidence-based models as template• All coaches and staff trained on utilization of written policy guide
<ul style="list-style-type: none">• Met
<ul style="list-style-type: none">• Met
G. Staffing Requirements
<ul style="list-style-type: none">• Co-Directors have been authorized CCAR facilitators since October 2016• Currently employs 5 recovery coach coordinators through direct hire and/or subcontract
H. Reports
<ul style="list-style-type: none">• Met
<ul style="list-style-type: none">• Met
2. Staffing
<ul style="list-style-type: none">• Met
<ul style="list-style-type: none">• Indicates no subcontractors to be used
<ul style="list-style-type: none">• 10.5 FTE• Met
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met• Provide detailed work plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/12/2024 – 1/25/2024

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Bidder stated that they are a 501(c)(3) nonprofit organization, and they are dedicated to their mission to empower people and organizations as they build healthy communities together.• Bidder stated that they are a community health coalition that has worked since 2001 with “hundreds of partners and thousands of individuals to address a wide range of public health needs”. Bidder stated that they build partnerships, coordinate programs, provide education, and improve policies and environments to create lasting positive changes to the health of their communities.• Bidder stated that their current focus areas are Substance Prevention and Recovery; Strong Beginnings; Healthy Aging; Active and Healthy Environments; Healthy Food for All; and Health Promotion and Management.• Bidder stated that their programs are available to everyone, while focusing on the most vulnerable and at-risk community members (no description included on how). Bidder stated that their approach is collaborative, creative and community based.• Bidder stated that their organization has over 20 years' experience with managing grants and personnel, convening diverse partnerships, implementing programming, tracking progress, reporting on deliverables, conducting evaluation processes, and working within budgets.• Bidder stated that they have been engaged in providing peer services to individuals with SUD since 2017 when they entered into a contract with the State as a provider of Recovery Coaching across Washington and Hancock Counties. Bidder stated that, through their coaching program, they have successfully exceeded contract deliverables every year since, and their coaches now serve in five counties.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that their two trainers have trained 605 peer coaches across the State since becoming CCAR-registered trainers in 2016.
- Bidder stated that in 2018, they augmented their Recovery Coaching by adding an AmeriCorps program called Maine RecoveryCorps. Bidder stated that, for three years, community members were brought on board, trained as coaches, deployed into communities and supported by the Bidder (how the Bidder supported this program was not described).
- Bidder stated that the National Council for Public Service chose not to continue this AmeriCorps program funding; however, the Bidder, their partner and host sites, the Governor's Office and the Office of Behavioral Health (OBH) recognized the impact of the program, and OBH chose to amend their coaching contract to keep the program operating in the field. Bidder stated that this program now has 19 individuals serving as interns providing peer support across five counties.
- Bidder stated that one of these interns was released directly from the correctional system into their program; and stated that the program has become a pathway into behavioral health careers for individuals who might otherwise have never seen themselves working in this field.
- Bidder stated that they have managed multiple federal grants in support of Recovery-related programs, and listed and described the following programs: SAMHSA MAT Expansion Grant (2018-2021); HRSA Rural Health Opioid Program (RHOP) grant (2017-2020); Rural Community Opioid Rescue (RCORP) (current); and their PROSPER (Pre/Peri/Post-natal and Parenting Resources and Other Support Systems for Pregnant Women/Families Engaging in Recovery) Project (current).
- Bidder stated that, for their PROSPER Project, they have three peer navigators: one in Hancock County, one in Washington County, and one serving members of the Passamaquoddy Tribe in Washington County. Bidder stated that their work with the tribal population is particularly important as tribal women with SUD face extreme levels of stigma, racism, and bias when they seek medical treatment during and after pregnancy.
- Bidder stated that their Tribal PROSPER Navigator has served as a bridge between the tribal and non-tribal communities, and has helped them build trust, expand awareness, conduct culturally competent outreach, and be present at their monthly consortium meetings to discuss specific experiences of tribal mothers and families. Bidder stated that this position has provided direct navigation support for Tribal women specifically at Motahkomikuk (Indian Township), and the Bidder's plan is to expand this successful supportive programming at Sipayik (Pleasant Point).

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- Bidder stated that they prioritize and work toward DEI across all programming; and formed an internal Health Equity Team in 2020 to examine their policies, practices and programs through a DEI lens. Bidder stated that they are currently in the process of finalizing their first Health Equity Strategic Plan for the organization.
- Bidder stated that they recently provided 2 trainings (one in Ellsworth and one on Indian Township) called “Strengthening Relationships with Cultural Competency: Increasing Understanding of the Passamaquoddy Tribe”, and both trainings were well-attended by members of their own team, community members, and staff from partner organizations.
- Bidder stated that they have increased their programmatic and organizational commitment to DEI in recent years; this included adding a Community Outreach and Equity Coordinator who works closely with partners “Mano en Mano” (partners not described), and Bidder again referenced adding a Navigator dedicated solely to serving mothers with SUD who are members of the Passamaquoddy Tribe.
- Bidder stated that in July 2021, they transformed their office space in Ellsworth into the INSPIRE (In Support of People in Recovery) Center with support from OBH. Bidder stated that consumers of this Center can access resource navigation, a variety of peer support groups, educational sessions, social events, and support and guidance as they work to identify goals, find clinical treatment when necessary and connect with resources to meet basic needs.
 - Bidder stated that currently, one of their Center staff members has completed all CIPSS training and attends quarterly co-reflections.
 - Bidder stated that three Center staff members are also currently enrolled in and participating in the winter core training. Bidder stated that four others are registered to attend Peer 101, the required CIPSS pre-training curriculum.
 - Bidder stated that all staff have completed the Recovery Coach Academy, which complements the CIPSS approach.
 - Bidder stated that, due to the high level of mental health needs presenting at their Center, they have determined that the best approach to meeting the needs of their community requires increased engagement in the CIPSS model.
 - Bidder stated that, if funded, they would be able to increase the availability of Structured Group Support Services available to their consumers.

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EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that they average 200 scheduled coaching sessions per year at the Center; and staff are trained to support walk-in needs and provide approximately 2000 peer support interactions annually.
- Bidder stated that their Center staff have fostered strong relationships with their community providers, which allows for warm handoffs, when appropriate. Bidder stated that this allows for their community members to receive seamless support and not “fall through the cracks”.

Project 1:

- Bidder referenced their Maine Alliance of Recovery Coaching and Maine Recovery Core Internship Program (MRC and ME ARC) projects, both funded through OBH.
- Bidder stated that both are interconnected programs that provide for the training and coordination of individuals to become Recovery Coaches.
- Bidder stated that the MRC program mentors individuals and provides a low barrier entry point into the workforce.
- Bidder stated that many individuals are current or former support service consumers.
- Bidder stated that MRC has been operating for five years, and has supported over 100 members/interns, many of which have moved onto higher level positions within the Bidder’s organization and their partner organizations.
- Bidder stated that, in the past 5 years, the Maine ARC has trained over 1000 individuals in peer support.

Project 2:

- Bidder referenced their work with the INSPIRE Center and their INSPIRE Warming Center.
- Bidder stated that they received State pilot funding to restructure their office into a Recovery Center in July 2021. Bidder stated that they leveraged additional funding sources to provide a strong staffing structure to support programming and peer support services offered at the Center.
- Bidder stated that they transitioned the former office space into a warm and inviting space with the direct input of consumers and volunteers.
- Bidder stated that upward of 2000 consumer interactions take place at the Center, annually.
- Bidder stated that their main focus originated as SUD recovery, however, they have been serving an increasing number of individuals identifying with SMI. Bidder stated that staff receive ongoing training to hone their skills to better serve the needs of the Center’s community.

**STATE OF MAINE
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EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that individuals using their peer support services at the Center voiced a significant unmet need to support their well-being through the winter months in Downeast Maine. Bidder stated that individuals asked for a warming center to stay safe, warm and sheltered. Bidder stated that they hosted a community wide emergency housing meeting, from which the determination was made to host the project within their own agency.
- Bidder stated that with support from local and State partners, they are able to open a warming center on December 23, 2023, and “it remained open 7 nights per week and weekend days until April 2023. It is unclear if the Bidder meant to write that the warming center was opened in December 23 of 2022, as opposed to 2023. Bidder also stated that the aggregate number of stays is 861.

Project 3:

- Bidder referenced a project that came about due to needs expressed by members of the Substance Use Response Collaborative and the community. Bidder convened a group of four partner organizations whose combined efforts resulted in the creation and launch of Safe Harbor, a Recovery Residence for Women and Children in 2020.
- Bidder stated that this house provides a safe living environment and a wraparound approach to support women with SUD as they navigate recovery, access systems of care, and work toward permanent housing and health.
- Bidder stated that their Safe Harbor location is the only MARR-certified residence in Washington County, and one of the only residences in Maine that houses children.

2. Subcontractors

- Bidder wrote “N/A”.

3. Organizational Chart

- Bidder provided an enterprise-wide organization chart showing officers, major organization components and the project team proposed to meet the requirements of this RFP.

4. Litigation

- Bidder wrote “N/A”.

5. Financial Viability

- Bidder provided financial statements audited by a certified public accountants’ agency for: 2020, 2021, and 2022.
- Bidder also included “MAAP IV REPORTS” documentation for 2021.

6. Certificate of Insurance

- Bidder provided Certificate of Liability Insurance on a standard ACORD form indicating the following insurance liability: commercial general liability;

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automobile liability; umbrella liability; and workers compensation and employers' liability.
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Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none">• Bidder stated that they will continue to maintain office locations capable of providing statewide Coordination Services for Recovery Coaching Services.• Bidder provided addresses for their primary offices, which are located in Ellsworth and Machias.• Bidder stated that, additionally, they hold a number of additional office locations and are partnered with organizations across the State, enabling them to provide coordination services across the State.• Bidder stated that they have a long history of collaborating and implementing programs across significant distances through a combination of phone, Zoom and travel.• Bidder stated that they will utilize additional distance platforms including websites, social media and other methods as needed to ensure seamless statewide coordination of services.• Bidder stated that their locations combine to serve as the base of operations for their organization's two "highly integrated" coaching programs: Maine Alliance for Recovery Coaching (Maine-ARC) and Maine Recovery Core (MRC), both serving as contracted programs with the Department.• Bidder stated that their Maine-ARC has provided training for Recovery Coaches and other interested individuals and organizations along with coordination and provision of Recovery Coaching Services since 2018. Bidder stated that their team and systems, described throughout their proposal, have been a dedicated force behind envisioning, implementing, honing and maintaining Recovery Coach and Training services (including Coordination) across the State. Bidder is the incumbent for this service.• Bidder stated that MRC has co-located within Maine-ARC since 2018 (first three years it operated as an AmeriCorps program) and is the workforce development arm of their coaching program.• Bidder stated that MRC serves the dual purpose of providing direct service to recoverees, across all their locations and facilities, while also growing, training and mentoring future members of Maine's behavioral health workforce through a paid internship system across the State.• Bidder stated that they will operate Monday through Friday, from 8a.m. to 5p.m., except during State Holidays and administrative closings.
B. Information Technology Requirements

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<ul style="list-style-type: none">• Bidder stated that they will continue to maintain their client and data management system for tracking client and training activities.• Bidder stated that they are currently using Department-approved tracking tools such as the Recovery Coach Tracking Sheet, Coordinator Tracking Sheet and CCAR Training Tracking Sheet.• Bidder stated that they have been utilizing the Recovery Data Platform (RDP) for much of their data collection and their plan is to slowly integrate other Department-approved tracking tools into the new, recently upgraded version of RFP 2.0. Bidder stated that this system is part of a cloud-based platform called Salesforce which “delivers quick, accurate data, along with a menu of tools and assessments needed to effectively implement recovery coaching services (RCS)” across their Maine-ARC and MRC sites.• Bidder stated that RDP is compliant with HHS requirements.• Bidder stated that RDP supports and will continue to support the tracking of client referral processing, coach certification/recertification, CCAR and other ongoing training activities, and will support all reporting requirements of this service.• Bidder stated that, given that they are currently utilizing and maintaining these systems and meeting all reporting requirements, they will be ready to continue to do so on day one of the contract.
<ul style="list-style-type: none">• Bidder stated that, as described in their response to B.1., RDP is compliant with the requirements set by the State’s Information Technology Policies, including those listed.• Bidder stated that they will also ensure that all of their other IT-related tools, including their social media, newsletters, internal website, external website, “and more” are in compliance with these policies.
<ul style="list-style-type: none">• Bidder stated that RDP is compliant with NIST 800-53 Rev 5 and will continue to be compliant into the future.• Bidder did not address physical/facility-related items in the list (e.g., physical and environmental protection).
<ul style="list-style-type: none">• Bidder stated that they have a long history of reporting, maintaining compliance and implementing policies with State and federal partners.• Bidder stated that they will continue to submit any and all required information in the format and timetable identified by the Department.
<ul style="list-style-type: none">• Bidder stated that RDP is compliant with the requirements set by the State’s Information Technology Policies, and all data will be stored as required within the United States.

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<ul style="list-style-type: none">• Bidder stated that RDP is backed up every 24 hours at the minimum, and they are confident in the platform's ability to quickly and completely restore data up to the most recent backup.
<ul style="list-style-type: none">• Bidder claimed that Salesforce is the largest data storage and cloud computing organizations in the US "and world". Bidder stated that RDP is never taken down.• Bidder stated that in the event of a shutdown or other technological outage, however, Salesforce is "well-prepared" to restore service within 24 hours.
<ul style="list-style-type: none">• Bidder stated that there are no planned outages of RDP.• Bidder stated that in the event that there is to be a planned outage, they will coordinate with the Department and their programmatic partners and sites to ensure minimal disruption to services, and they will ensure that planned outages during the business week will be limited to one time per month, or less.• Bidder stated that downtime to routine maintenance will not occur without approval in writing from the Department.
<ul style="list-style-type: none">• Bidder stated that, according to information available from Salesforce, RDP has provided 99.9+ percent of uptime.
<ul style="list-style-type: none">• Bidder stated that RDP has the capability to provide an annual full SSAE16 SOC 2 Type 2 annual audit to the Department.• Bidder stated that they are "well-positioned" to meet this requirement and will do so.
<ul style="list-style-type: none">• Bidder stated that they are the current vendor; and in the event that they continue this role, there will be no need to transfer data.
<ul style="list-style-type: none">• Bidder stated that they will provide the Department with raw data in the format specified at no additional charge.• Bidder stated that they will work with the Department to meet all data requests and format requirements.
C. Coordination and Collaboration
<ul style="list-style-type: none">• Bidder referred the reader to their Attachment 7 – Communication and Collaboration Plan, which they state fully describes their plan to collaborate with individuals and organizations across their ten-county service area and beyond to maintain and foster relationships and maintain and hone protocols and systems of referral and engagement with Coaches.• Bidder stated that their coaching programs are designed to be flexible and responsive to the needs of their partners, coaches and the people served by these programs across the State. Bidder stated that they hold relationships "as key" to all of "this" work.

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- Bidder provided Attachment 7 – Communication and Collaboration Plan.
 - Bidder stated they would strengthen working relationships with individuals and organizations in the community they serve. Bidder stated that they have a long-standing history of working relationships, collaboration, organizing, networking and bringing individuals, communities and partners together in effective ways to respond to SUD and other areas of community need. Bidder stated that throughout the evolution of their coaching programs, their recovery coaching system has been built with input from their communities, partners, recovery coaches and those they serve. Bidder stated that part of this program development included building relationships with local and regional organizations including State and federal partners.
 - Bidder stated that sometimes they are able to offer assistance, particularly with training, to the communities they serve; and have had multiple requests outside their region for partnership, technical assistance, training, CoacherVision, “and more”.
 - Bidder stated that they would expand their system of engagement and protocols for volunteer recruitment and management. Bidder stated that their screening and training of volunteers are also wrapped around their system of coaching which includes recruitment, coach onboarding a “high quality” matching and referral process, ongoing education, data collection, and a system of engagement between coaches and recoverees. Bidder stated that their system is both flexible, to accommodate growth, and stable, to provide reliable, consistent services.
 - Bidder stated that to continue their expansion of volunteer recruitment and management, their Co-directors will continue to work with other organization staff to fine tune their internal process and make any needed adjustments to their on-line Volunteer Form (link provided) for those interested in volunteering and will update written guidance regarding the process.
 - Bidder stated that they will work with the Statewide Hub and their Maine Alliance for Recovery Coaching (Maine-ARC) and Maine Recovery Core (MRC) to engage those that are interested specifically in coaching others by being a community volunteer or applying for the MRC program. Bidder stated that they will deepen the connection between MRC interns and community recruitment, utilizing the power of interns to have conversations, post recruitment flyers and offer opportunities to serve others.

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- Bidder stated that another effective area that they can build on for recruitment, communication and collaboration are the CCAR trainings offered by the Maine-ARC Co-directors. Bidder stated that both are CCAR Authorized Facilitators. Bidder stated that they hold at least two trainings every month. Bidder stated that training would be an effective area they could build on for recruitment, communication and collaboration; however, did not describe how they would build on this area.
- Bidder stated that training is an opportunity to talk about the Maine-ARC and MRC programs, coaching protocols and systems of referral, which Bidder stated are usually of great interest. Bidder stated that many organizations lack the training and internal structure for RCS, although they are now funded to have coaches on staff. Bidder stated that with additional capacity, this could be an opportunity for technical assistance to other organizations in best practices regarding RCS.
- Bidder stated that along with technical assistance, they have also been successful in recruiting volunteer and paid recovery coaches through those attending CCAR training.
- Bidder stated that they will continue to engage partners in the 10 counties of service.
- Bidder stated that their Recovery Coach Coordinators are provided with standardized training tools, including a PowerPoint presentation and associated materials to offer to organizations interested in offering, understanding or promoting RCS. Bidder stated that they will continue to grow their toolkits as needs and opportunities present themselves.
- Bidder stated that they would continue to strengthen systems of referral. Bidder stated that their coaching programs have invested multiple years into developing, deploying and refining their low-barrier referral systems, which were developed with their partners and those they serve, “making access to coaching as easy and seamless as possible.”
- Bidder stated that their Recovery Coach Request Form (linked) can be accessed on-line or in-person for those who may not have computer access. Bidder stated that many will walk into a Recovery Center where staff can assist those with the form.
- Bidder stated that promotion happens in a variety of ways: coordinators utilize the tool daily to share with those that are seeking services; Co-directors share such at every CCAR training; and the tool is shared with organizations as presentations continue to unfold across the state.

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- Bidder stated that follow-up regarding the system of referral with their partners is an ongoing task that includes Coordinators and Co-directors, as partner organizations sometimes experience turnover in staff and point people.
- Bidder stated that to deepen connection to the system of referral, they will work with the Hub to broadly share the recovery coach request form.
- Bidder stated that they will utilize MRC interns to conduct presentations to partner organizations, follow-up with existing or reach out to new partners, and inform them of free coaching services and how to access. Bidder stated that this type of networking will also stimulate more interest in CCAR training, recruitment of volunteer and paid recovery coaches, and those that are interested in working in the recovery support field.
- Bidder stated that working closely with their organization's Communications Director, they will continue to "reach deep" into media and social media outlets such as: Facebook, Instagram, Twitter, Discord, newsletters, and their newly formed relationship with Journey magazine and their monthly Recovery Coaching Column, with a circulation of 15,000.
- Bidder stated that trained coaches across the State are eager to remain connected after the weeklong Recovery Coach Academy, and in response they will launch a group on Discord.
- Bidder stated that in addition to various media outlets, their 5 Maine-ARC Coordinators will continue to be the voice and boots on the ground in their respective communities with access to partners, treatment courts, jails, recovery centers pre-release, treatment centers, medical settings "and more".
- Bidder stated that their Recovery Coach Coordinators and Maine Recovery Core Interns are experts at networking and having conversations with community and partners, promoting the RCS, system of referral and engagement for recruitment and training services.
- In regard to expanding on Statewide communication and collaboration – Bidder stated that Co-directors will closely work to expand efforts and to strengthen the system of referral for RCS with their partners at DHHS, OBH "and others", to implement specific training or presentations for systems such as Opioid Health Homes (OHH) , Office of Child and Family Services (OCFS), to inform what is a recovery coach, educate on best ways to support recovery coaches on staff, supervision of recovery coaches and best practices on RCS.

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<ul style="list-style-type: none">○ Bidder stated that the requests for communication and collaboration from current and potential partners are abundant and their current challenge is staff capacity. Bidder stated that they look forward to the opportunity to deepen and expand their communication and collaboration across the State, growing their capacity to meet the requests and enhancing their systems to work more efficiently and effectively together. Bidder stated that by expanding and providing high quality training, recruitment, supervision, systems development and data collection, they will continue to develop effective, far reaching peer recovery coaching programs, building healthier communities and helping people succeed on their recovery journeys.
<ul style="list-style-type: none">• Bidder stated that in collaboration with the Department, they have two integrated recovery coaching programs, Maine-ARC and MRC; and they have worked diligently to coordinate scheduling across locations to develop on-call recovery coaching, coordination of services and creation of a training schedule that works around the needs of their partners in terms of responding to the volume of recoveree needs and the acuity of requests.• Bidder stated that striving to increase the impact and likelihood of success of RCS across their 10-county region in Maine, they currently network with over 200 community partners and referral sources. Bidder stated that currently, their Maine-ARC and MRC sites offer specific attention to the correctional system, pre-release, treatment courts and Recovery Centers, working specifically with and targeting services for those who may be most vulnerable to problematic use and most at risk of overdose.• Bidder stated that they are well-positioned to continue the development of RCS to meet the growing need across the State and meet the increase in volume and acuity of recoveree needs. Bidder stated that since 2018 they have formed partnerships with communities and organizations across the State and are eager to continue the expansion of RCS to reach more people and organizations that want connection to RCS.• Bidder stated that with continued funding, they will build on their solid foundation and expand capacity across the region. Bidder stated that they will create two new full-time Maine-ARC and MRC Program Manager (PM) positions, dedicated to working directly with the Recovery Coach Coordinators (RCCs) and MRC Interns.• Bidder stated that, working closely with their Maine-ARC and MRC Directors, their PMs will provide support to the RCCs and Interns to expand the successful collaboration to individuals and organizations in the region to

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<p>establish or deepen working relationships, orient new organizations to the system of referral and engage them with RCS.</p> <ul style="list-style-type: none">• Bidder stated that the Maine-ARC PM will offer ongoing technical assistance to the RCCs in following all coaching protocols and will work with the RCCs to monitor the continuous follow-up and quality assurance with each community provider and community resource that is engaged in the RCS.• Bidder stated that with additional staffing support and by offering ongoing training, technical assistance and the widening of their reach to individuals and organizations for services who have recently experienced or are at high risk of opioid-related overdose, they will increase the coordination, scheduling, and facility locations, continuing to develop on-call Recovery Coaching that accommodates the times, needs, and locations of those organizations seeking connection to the RCS and serving those with the highest need.
<ul style="list-style-type: none">• For 3a – Bidder stated that they feel well-positioned and have internal structures to support the continuation of their work in integrating the structures and resources behind RCS across the counties they serve, providing services since 2018.<ul style="list-style-type: none">○ Bidder stated that they would work together with their “MRC” (not spelled out) sites and help them build capacity by accessing their paid internship program.○ Bidder did not describe how they would synchronize and integrate activities and structures to ensure the resources of each RCS is used most efficiently in pursuit of the RCS goals.• For 3b – Bidder stated that they will continue and expand to work with all statewide partners, the hub and recovery support centers to offer technical assistance.<ul style="list-style-type: none">○ Bidder stated they built collaboratively with partners of “200 plus organizations.”○ Stated they have built and stewarded a referral network since 2018.○ Bidder stated that they are continually expanding with interested new partners.○ Bidder stated that they support partners that have staff who need to attend CCAR training (description of how support is provided was not indicated).○ Bidder stated that organizations reach out regularly for technical assistance, training inquiries and best practices regarding coaching and supervision and their team is “always on deck” (not further detailed) to provide assistance, customize training, answer questions and provide guidance, and will continue to do so.

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<ul style="list-style-type: none">○ Bidder did not describe how they would organize, monitor, control and coordinate as a key function of effective management.
<ul style="list-style-type: none">• Bidder stated that they have experience implementing the GPRA survey to recoverees receiving recovery services in compliance with GPRA requirements.• Bidder stated that GPRA administration, tracking and monitoring has been absorbed into the workflow of their Coaches and Coordinators.• Bidder stated that during placement meetings, all recoverees are asked to participate in the GPRA survey process, if the recoveree agrees to participate, the Coordinator will conduct a full GPRA Intake Survey. Bidder stated that for those who decline to participate, the Coordinator conducts an Administrative Intake Survey.• Bidder stated that the Coordinator “makes an effort” to conduct a 6 Month Follow-up Survey with all recoverees and GPRAs are tracked in the GPRA tracking spreadsheet.• Bidder stated that Co-directors and Coach Coordinators will continue to ensure that the GPRA Deliverable Checklist will be completed within 30 calendar days from the start of providing coaching services, “as outlined in this RFP.” Bidder stated that since this is already part of their system, they will be able to meet this deliverable from day one of the contract.
<ul style="list-style-type: none">• Bidder stated that they continue to engage, train and recruit volunteers across their service region.• Bidder stated that they continue to evolve their current system of engagement, protocols, and processes to recruit community volunteers, details on evolution not provided.• Bidder stated that their screening and training of volunteers are part of their system of coaching, which includes recruitment, coach onboarding, high quality matching and referral process, ongoing education, and a system of engagement between coaches and recoverees or affected others, including the collection of data.• Bidder stated that they have trained, supervised and mentored over 100 community volunteers across their sites, including some who transitioned to be Maine Recovery Core Interns.• Although Bidder referenced experience and experience-related data, they did not discuss how they would recruit volunteer Recovery Coaches capable of delivering quality RCS to Recoverees and Affected Others, aside from mention of individuals who attend training and reach out for more information.
D. Core Knowledge Training, Supervision, and Workforce Development

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- Bidder stated that they have and will continue to ensure that Recovery Coaches: complete CCAR RCA prior to RCS delivery, with training documented in a Department-approved excel spreadsheet; complete CCAR ECRC within 9 months of hire, also tracked in the same Department-approved spreadsheet; and continue to participate in CCAR recovery coach trainings, and other ongoing learning opportunities such as the Bidder's full recovery team meeting, which offers year-round learning opportunities (multiple examples listed).
- Bidder stated that ongoing education is also offered.
- Provided Attachment 8 – Training and Supervision Plan.
 - For developing CoacherVision locations/environments as specific needs emerge - Bidder stated that they will continue to offer CCAR training to those that want to be CoacherVisors and technical assistance to organizations or systems that have coaches on staff.
 - Bidder stated that they would work with OBH and respond to emerging needs. Bidder stated that over the past year, their co-directors participated in the Delivery System Reform Unit (DSRU) Regional Forums coordinated by OBH; and was an opportunity to present on recovery coaching and supervision and talk with providers who now have recovery coaches on staff. Bidder stated that a half-day event was also subsequently held at DHHS in Augusta where they offered a zoom presentation on coaching and CoacherVision.
 - Bidder stated that they would offer tools and CCAR training for organizations, staff and recovery coaches. Bidder stated that they have developed written guidance and processes for CoacherVisors to ensure sessions that are high quality and helpful to recovery coaches.
 - Bidder stated that written agendas, guidance for group working agreements, tracking sheets for attendance, calendar offerings and technical assistance and support will be available to support emerging systems that want to support their Coaches with CoacherVision.
 - For provision of CCAR Recovery Coach training to increase the number of trained Recovery Coaches available to prospective Recoverees - Bidder stated that their co-directors (with RCP-F designation) have mentored three additional staff that hold RCP-F and two that hold the RCP.

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<ul style="list-style-type: none">▪ Bidder stated that the co-directors are in the process of building an internal training program for new facilitators, slowly integrating them into the training schedule as capacity allows. More details not provided.▪ Bidder provided their “to date” data of number of trainings for provided based on type, and people at trainings.▪ Bidder also provided a timeline chart of their comprehensive training and supervision plan.
<ul style="list-style-type: none">○ Bidder included a “CoacherVision Plan” table in their response indicating the timeline for CoacherVision trainings and designated CoacherVisors. <ul style="list-style-type: none">• Bidder stated that mandatory supervision is provided and will continue to be provided to all Recovery Coaches through “well-established systems.”• Bidder stated that all Maine-ARC and MRC Coordinators are CCAR-trained CoacherVisors.• Bidder stated that all of the described activities, offerings and requirements are currently in place and will continue to be in place across the life of the contract.• For a. – Bidder stated that CoacherVision is offered to Recovery Coaches and Coordinators multiple times a month and they require that all Coaches participate at least once per month, if not more. Bidder stated that their Department-approved CoacherVision tracking tool documents every time a Coach attends a session. Bidder stated that if a Coach cannot attend a scheduled session, they can request an individual session with their Coordinator or join a pop-up session when offered.• For b. - Bidder stated that all Coaches are registered (or in the process of becoming registered) with the Maine Recovery Coach Certification Board. Bidder stated that they will ensure that all future Coaches likewise register with the MRCCB.• For c. – Bidder stated that all Recovery Coaches provide RCS in accordance with their agreement with the Department.• For d. – Bidder stated that CoacherVision is offered multiple times a month and Coaches are mandated to attend a minimum of one hour a month. Bidder stated that through robust and high quality CoacherVision, they ensure RSC model fidelity.• For e. – Bidder stated that all Coaches provide high quality RCS to Recoverees or Affected Others;• For f. – Bidder stated that Maine-ARC and MRC staff adhere to and work within a high-quality system of matching Coaches to Recoverees by following written guidance and procedure in the Recovery Coach Coordinator Handbook.

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<ul style="list-style-type: none">• For g. – Bidder stated that all Coach Coordinators administer RCS request procedures to ensure a safe and accountable process and work with Recovery Coaches to ensure optimal compatibility with Recoverees by following written guidance and procedure in their Recovery Coach Coordinator Handbook. Bidder stated that Co-directors provide Coordinators with direct supervision and ensure a high-quality system of Coach requests and RCS.• For h. – Bidder stated that all Recovery Coach Coordinators conduct initial placement meetings with potential Recoverees, ensuring quality of intake and screening processes by following the written guidance and protocols in the Recovery Coach Coordinator Handbook. Bidder stated that Co-Directors provide Coordinators with direct supervision and ensure a high-quality system of placement meetings and RCS.
<ul style="list-style-type: none">• Bidder stated that their Maine-ARC has been providing CoacherVision to Coaches and Coordinators since 2018.• Bidder stated that they ensure that Peer supervision is completed with a group of two or more peers, or one-on-one with the Coach Coordinator at least once per month.• Bidder stated that all Maine-ARC and MRC Coordinators are CoacherVisors and hold monthly sessions for Recovery Coaches.• Bidder stated that Co-directors have developed a written agenda and guidance for CoacherVision sessions, with a working agreement developed by the group that is reviewed at each session.• Bidder stated that their Coordinators have been trained for all processes and are offered support and technical assistance, as needed.• Bidder stated that methods of notification include a Maine-ARC and MRC training calendar that is shared with all recovery team staff at the organization.• Bidder stated that attendance for all in a Coaching role is mandatory for at least one hour a month. Bidder stated that, however, they find that many Coaches attend more and/or request an individual or pop-up session for support.• Bidder provided their current CoacherVision schedule, including one-on-one sessions scheduled individually between Directors, Coordinators and Coaches; and “pop-up sessions”, where if enough people are interested, a Coordinator will schedule a “pop-up session” in between normally scheduled times.
<ul style="list-style-type: none">• Bidder stated that their two Co-directors hold the CCAR designation of Recovery Coach Professional Facilitators (RCP-F), have mentored three additional staff who hold the RCP-F and two who hold the RCP. Bidder stated that training requests have increased greatly over time and building capacity for long-term sustainability is critically important.

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- Bidder stated that currently, the Co-directors are in the process of building an internal training program for new facilitators, slowly integrating them into the training schedule as capacity allows.
- Bidder stated that to date, they have trained 1,482 people in the following trainings:
 - RCA – 47 trainings and 694 people;
 - ECRC – 21 trainings and 359 people;
 - Recovery Coaching basics – 23 trainings and 211 people;
 - CoacherVision – 6 trainings and 71 people;
 - RCED – 7 trainings and 68 people;
 - RC & Professionalism – 5 trainings and 50 people;
 - RC in the Justice Setting – 1 training and 25 people (new this year); and
 - RC and Spirituality – 1 training and 14 people (new this year).
- Bidder stated that the volume of training requests has grown over time and continues to grow; and they are eagerly building systems and capacity to meet these growing needs, which they see as reflective of an increased understanding of the importance and effectiveness of Coaching, long into the future.

Bidder stated that if awarded, they will continue and grow these trainings, and will introduce others if and when the need and opportunity arise.

- Bidder stated that they have operated Maine Recovery Core (MRC) since July 2021, a workforce development program supporting people seeking to enter the behavioral health field, with support from the Office of Behavioral Health.
- Bidder stated that for three years prior, the program operated as Maine RecoveryCorps, and was supported by Volunteer Maine as an AmeriCorps program.
- Bidder stated that between the two programs, their organization has amassed five years' experience in operating a workforce development program through which Recovery Coaches are trained, placed in the field and supported as they work towards entering the behavioral health workforce.
- Bidder stated that thanks to investments made by the Department, MRC has been able to not only been able to “thrive and succeed as viable pathway to the behavioral health workforce”, it has also been able to attract investments from other funding sources. Bidder stated that in addition to Department funding, MRC has been able to leverage approximately \$100,000 annually from a combination of cost shares paid by host sites and other philanthropic sources and grants, expanding their reach and impact across the state.
- Bidder stated that MRC currently serves Kennebec, Hancock, Franklin, Penobscot, Somerset, Waldo, Knox and Washington Counties.

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- Bidder stated that MRC and Maine-ARC together have implemented community-based Recovery Coaching systems, and have engaged multiple partners in each county, including health care, treatment, jails, treatment courts, re-entry, social services agencies, harm reduction, law enforcement, and other community partners.
- Bidder stated that through engaging partners and providing high-quality training, recruitment, supervision, systems development and data collection, MRC has developed effective, far-reaching, paid Recovery Coaching programs that achieve the following outcomes: individuals seeking support for Recovery are matched with trained, registered Coaches who are part of a statewide system that includes supervision and ongoing training; and interns become part of a system designed to build Maine's behavioral health workforce by providing income, training, ongoing professional development, linkages to existing workforce pathways, introductions to professional networks, placement in professional environments and skill-building in the areas of technology, communication, service provision, supervision, "and more."
- Bidder stated that they deployed 78 trained Coaches in Maine since 9/1/18: 47 Coaches served in MRC; and 37 Coaches served in RecoveryCorps.
- Bidder stated that 604 Recoverees have been coached since 9/1/18 and stated that a breakdown between those served by MRC and RecoveryCorps is unavailable.
- Bidder stated that a minimum of 30 Coaches have accepted positions in the behavioral health field and added that there may be more that they are not aware of. Of these 30, 15 served in MRC and 15 served in Recovery Corps.
- Bidder stated that intern Coaches receive training and experience while earning an income, and many leave their internship to accept permanent positions in the workforce. Bidder stated that partner sites are able to increase their capacity at a relatively low cost, and often are able to fill a vacancy with a trained person with whom they now have a relationship. Bidder stated that community members seeking support in their recovery are thus able to access a trained Coach at more locations than there would otherwise be, without said interns.
- Bidder stated that current host sites include Bangor Area Recovery Network, Kennebec Behavioral Health, INSPIRE Recovery Center, Machias Recovery Center, Waldo County Sheriff's Office, MRPN/Augusta Recovery Reentry Center, Acadia Family Center, and Healthy Community Coalition; and past host sites have included Wellspring, Penobscot County Health Center, Regional Medical Center of Lubec, and the Aroostook County recovery centers.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/12/2024 – 1/25/2024

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that MRC Intern Coaches have provide the following duties, each of which comes with associated gains in professionalism and skills:
 - Peer coaching (e.g., providing hope and empowerment, brokering resources, removing barriers to success);
 - Serving as first point of service for host sites (e.g., answering phones, greeting people);
 - Conducting community outreach by attending and tabling at events;
 - Collecting and submitting data for MRC, Maine-ARC, and host sites;
 - Distributing naloxone, fentanyl test strips and other harm reduction materials;
 - Writing articles for the organization's newsletter;
 - Developing graphics and language for social media;
 - Maintaining physical resources (clothing, backpacks, food) for Recoverees; and
 - Serving as mentors for newer Intern Coaches once they have been in the program for at least one year.
- Bidder stated that Intern Coaches are required to complete RCA, Ethical Considerations for Recovery Coaching and Recovery Coaching and Professionalism; maintain a Maine Registered Peer Recovery Coach Certificate; participate in monthly TA and skill-building sessions; attend monthly CoacherVision; attend monthly full recovery team meetings held by the organization; participate in one-on-one monthly supervision with the MRC Coordinator and Program Director; follow work plans established by Coordinators; and participate in annual evaluations if they remain in the program past the one year mark.
- Bidder stated that Intern Coaches are provided with laptops and cell phones and have access to support from the organization's Technology Manager.
- Bidder stated that MRC also has a "robust slate of offerings" for the Intern Coaches that includes access to paid training in the behavioral health field offered by partners and other outside organizations; funding to attend recovery-related events across the State, including the annual Maine Opioid Summit; access to a behavioral health clinician "if personal issues arise"; access to a Friday Help Desk, which is a 2.5 hour session in which "they can receive help with anything at all"; access to an internal MRC website where they can find how-to videos, resources, calendars, commonly used forms, and other guidance; phone, text, and messenger support throughout the day from their supervisors, mentors and/or peers; personalized Coach Support Plans developed with their supervisors; and the option to become or be matched with more experienced Intern Coaches through the mentor/mentee program.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/12/2024 – 1/25/2024

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that each year that has passed since MRC emerged from RecoveryCorps has brought deeper integration between this program and Maine-ARC.
- Bidder stated that their Coaching team first navigated the process of integrating AmeriCorps volunteers into a community volunteer program; and as they transitioned to MRC, their organization's team more broadly navigated the process of bringing paid interns on as staff members and developed systems for onboarding, training, and paying them fairly while staying within all applicable Maine labor laws and within the context of an internship program.
- Bidder stated that three years in, their system works seamlessly within their personnel and finance policies, as well as being fully integrated programmatically with Maine-ARC.
- Bidder stated that taking everything they have learned, their organization is poised to bring this model to other programmatic areas of their work and to offer it as a model to other organizations seeking to do something similar.

E. Programmatic Quality Assurance and Technical Assistance (TA)

- Bidder stated that their coaching programs have numerous written protocols, including regarding the items listed.
- Bidder stated that they have written protocols for continuous follow-up and quality assurance, which include a process for Assessment of Recovery Capital; specifically, they use the Brief Assessment of Recovery Capital (BARC). Bidder stated that this guidance is detailed in the MARC Recovery Coach Coordinator Handbook. Bidder described the BARC-10, and that their current process for assessment of Recovery Capital includes the initial BARC which is conducted at the Recoveree's placement meeting.
 - Bidder stated that the BARC is administered again every 30 days, that this tool can be very helpful to see progress being made or areas that may need improvement, and scores on specific domains can offer insight into areas to focus on and inform recovery goals.
 - Bidder stated that when completing the BARC-10 over time, it can be used to show areas of growth, provide immediate feedback and encourage individuals in their recovery.
 - Bidder stated that a decreasing score will indicate areas that may need more support and an increased score indicates progress and growth.
 - Bidder stated that they will be ready to continue administration of the BARC on day one of the contract.
 - Bidder did not address Department review and approval of the process for Assessment of Recovery Capital within three months of contract start and implement quarterly.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/12/2024 – 1/25/2024

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that many of the individuals they serve are high acuity and at risk of opioid-related overdose. Bidder stated that they work in multiple settings such as jails, treatment courts, pre-release centers and recovery centers, who serve a high-risk population.
- Bidder stated that they serve those at high risk and those that have recently overdosed through referrals through OPTIONS, the INSPIRE Recovery Center, EMS, MDI Hospital, law enforcement, Project Hope, Intensive Case Managers “and more partners and settings.”
- Bidder stated that currently, individuals identified as high acuity and/or at particular risk are connected immediately to their Recovery Coach system and often have their first meeting with their program staff in the moment, at the point of contact or service. Bidder stated that it is their goal to codify these processes with written protocols early in the new year, and they will share them with the Department for discussion and approval prior to finalizing.
- Bidder stated that they will work with the Department to ensure that all written protocols are reviewed and approved by the Department upon development and prior to implementation, as well as following any changes.

- Bidder stated that their integrated Coaching programs, Maine-ARC and MRC, provide ongoing, robust, consistent and responsive technical assistance to Recovery Coaches and Recovery Coach Coordinators.
- Bidder stated that the Maine-ARC Co-directors and MRC Director will continue to facilitate a 1.5-hour weekly meeting with all Recovery Coach Coordinators (RCCs), offering technical assistance on a variety of topics, built with input on areas they would like to explore.
- Bidder stated that once per month, their weekly meeting becomes a Coordinator CoacherVision, specific to the support of RCCs actively coaching others, while supporting Coaches they supervise.
- Bidder stated that their RCCs also have a weekly check-in with their supervisors, and this weekly meeting allows time with each RCC and for them to bring topics or questions regarding their site and MRC Interns they are supervising.
- Bidder stated that emerging Recovery Coaching System (RCS) issues are identified and discussed.
- Bidder stated that action items from their meetings can include modifying system processes so things are working more efficiently, suggestions on documents (live or on-line) that need to be altered or repaired and continuing education requests are integrated into their year-round internal educational programming.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 1/12/2024 – 1/25/2024

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that RCCs also have a weekly check-in with their Recovery Coaches. Bidder stated that this offers a time for questions, TA, and support in areas such as paperwork, data collection and any ethical considerations that may be emerging.
- Bidder stated that many RCCs have contact with and access to their Recovery Coaches on a daily basis which makes TA available immediately.
- Bidder stated that the MRC Director and MRC Coordinator offer monthly TA sessions and supervision which is mandatory, and an optional help desk that is available weekly. Bidder listed example topics that may be included in sessions, including Google Drive navigation; coaching paperwork and data collection; work plan development; creative problem solving; workforce, professional development, and leadership training opportunities; resource brokerage; conflict resolution; enhancing core competencies; and how to provide feedback in positive ways.
- Bidder stated that Directors or Coordinators will respond to all requests for TA within two business days and are available daily for TA, support, CoacherVision or any potential ethical considerations that may arise.
- Bidder stated that their Coordinators and Coaches are trained with the philosophy that “we are a coaching and coordination community, and we don’t have to figure any of this out alone!”

F. Recordkeeping, Data Collection/Management, and Supportive Documentation

- Bidder stated that each Coordinator provides a monthly PMR and Narrative report to the Maine ARC Co-Directors which is combined to complete the Maine ARC/MRC monthly report, which is then sent to OBH.
- Bidder stated that the Department-approved Recovery Coaching Tracking Tool that they currently use, and will continue to use, is stored in a private, protected Google Drive and in an Excel spreadsheet format.
- Bidder stated that the tool tracks: names of all Coaches; county they are based in; date of attendance; which CoacherVision they attended; and total of accumulated hours.
- Bidder stated that they also have a tool that allows Coordinators to sign up in advance to conduct the sessions.
- Bidder stated that Co-directors have developed a written agenda and guidance for CoacherVision sessions, with a working agreement developed by the group that is reviewed at each session.
- Bidder stated that all of their Maine-ARC and MRC Coordinators are CCAR trained CoacherVisors and hold monthly sessions for Recovery Coaches.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

<ul style="list-style-type: none">• Bidder stated that the creation and maintenance of records for their on-boarded Recovery Coaches are documented in a Department-approved excel spreadsheet entitled: MARCH Coaching Tracking sheet, which is housed in a private, protected Google Drive.• Bidder stated that the spreadsheet lists: First and last name; address; telephone; email; and completion dates of CCAR RCA, ECRC and other trainings that are relevant to RCS.• Bidder stated that they also document dates of interview, reference check, background check, status of Coaching (pending, approved, or needs to be on-boarded), and county that they will be primarily Coaching in.
<ul style="list-style-type: none">• Bidder stated that they will ensure completion of the RCS outcomes at the outset of intervention and every 30 days thereafter. Bidder stated that they have a long history of reporting, compliance and implementing policies with State and Federal partners and will continue to submit any and all required information to show compliance in the format and timetable identified by the Department.• Bidder stated that they will maintain their current data collection software, the Recovery Data Platform (RDP) and stated that RDP is compliant with the requirement set by the State's Information Technology Policies.• Bidder stated that they will ensure that the physical or digital copies of each outcome measure used in reporting is stored for the duration of the resulting contract and that confidentiality of information is maintained.• Bidder stated that all physical records are kept using a double lock system and all digital records are similarly kept in compliance with maintaining the confidentiality of information regarding individuals receiving services.• Bidder did not state that they would ensure the physical or digital copies are maintained in accordance with 42 C.F.R. Part 2 Final Rule, et seq., and other applicable sections of State and federal law and regulations, including compliance with HIPAA.
<ul style="list-style-type: none">• Bidder described their early history of developing RCS.• Bidder stated that their written policies have evolved over time as their programs and sites, partners and needs of the people they serve have evolved.• Bidder stated that written procedure and policy/guidance has been developed for Recovery Coach Coordinators (RCCs) and Recovery Coaches regarding communication between Coaches, Recoveerees, and staff regarding placement and referral.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

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EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that the guidance and procedure for Coordinators are housed in the Maine-ARC Recovery Coach Coordinator Handbook and housed in the Recovery Coach Handbook for Coaches.
 - Bidder stated that Handbooks are reviewed as part of the on-boarding process.
 - Bidder stated that written procedure and policy/guidance has been developed regarding appropriate placement and referral between qualified and licensed staff, Recoverees, and Coaches.
 - Bidder stated that all MARC and MRC Coordinators and Coaches have been trained on the referral process for Coaching; and guidance and procedures are housed in the Maine-ARC Coordinator Handbook for RCCs and in the Recovery Coach Handbook for Coaches.
 - Bidder stated that guidance will be written regarding the use and maintenance of equipment, all Maine-ARC and MRC staff will be trained to this guidance, which will be housed in the Recovery Coach Handbook and Coordinator Handbook.
 - Bidder stated that protocols for using and maintaining equipment such as laptops, phones, copiers and other office devices have been developed and are maintained by their Director of Operations and their Technology Manager. Bidder stated that all staff and interns are trained in these protocols.
 - Bidder stated that all Maine-ARC and MRC staff and Coaches are trained during their onboarding on applicable requirements regarding confidentiality. Bidder stated that this topic is reviewed at their full Recovery Team ongoing learning sessions, their weekly Coordinator meetings, during their Ethics Refresher and at MRC skill building sessions.
 - Bidder stated that Directors of Maine-ARC and MRC routinely visit the topic of confidentiality in the workplace, offering TA and support when needed, and will add the documentation of training sessions of this topic to the Department-approved Coach and Coordinator tracking sheet.
 - Bidder stated that they have and utilize protocols for documenting these trainings regarding confidentiality.
-
- Bidder stated that they have created and will continue to maintain Recoveree records that are listed in a Department-approved excel spreadsheet housed in a private, protected, HIPAA-compliant Google Drive.
 - Bidder stated that the spreadsheet lists:
 - Brief summary of all contacts;
 - List of contacts with the RCS provider and/or community providers;
 - General information including:
 - Recoveree identification;

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EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

<ul style="list-style-type: none">▪ Date, time, duration of contact;▪ Parties included; and▪ Location of contact;○ Source of referral;○ Phone number, email;○ Request date, placement date and the date they were matched with Coach;○ Recovery Coach Agreement date and Hold Harmless date; and○ Dates for completed and upcoming GPRA and BARC collections.
<ul style="list-style-type: none">• Bidder stated that they will ensure that any revisions to policies and procedures will be submitted to the Department for approval within ten business days of the contract start date.• Bidder stated that going forward, all changes to policies and procedures will be discussed with and submitted to the Department in advance before being implemented.
G. Staffing Requirements
<ul style="list-style-type: none">• Bidder stated that their Maine-ARC Co-directors have been authorized CCAR facilitators since October 2016, and held their first Recovery Coach Academy January 2017.• Bidder stated that their Maine-ARC Co-directors both hold the Recovery Coach Professional-Facilitator (RCP-F) designation; and since 2017, have facilitated the Recovery Coach Academy 47 times to 694 people and facilitated ECRC 21 times to 359 people. Bidder stated that they have also provided trainings in additional CCAR courses and will continue to do so.• Bidder stated that beginning in 2019, Maine-ARC expanded with the addition of five Recovery Coach Coordinators. Bidder stated that two of the coaches were employed directly (Washington and Hancock Counties) and the others were employed by partner agencies with whom they held subcontracts in Somerset, Waldo and Piscataquis Counties. Bidder stated that ultimately, their Piscataquis County Coordinator transitioned onto their staff.• Bidder stated that if they continue in the role of holding the contract and continuing this work, they will operate with all five RCCs as Bidder's staff members, rather than contacting the role out to partners.• Bidder stated that this does not signify a reduction in their commitment to serving and supporting their partners, but rather has been proven as a way to ensure greater fidelity to the program, foster a more cohesive team of RCCs and provide greater and deeper support to the RCCs working at other sites, all while providing strong support to and collaboration with their partners across the State.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder did not address if their RCCs would be certified CoacherVision facilitators.

H. Reports

- Bidder stated that they have these reporting systems in place and are experienced at compiling and submitting thorough reports to the Department on time.
- Bidder stated that they will submit all reports listed in Table 1 and any additional reports requested by the Department.

- Bidder stated that they have many years of experience successfully implementing State contracts, including submission of timely, detailed reports that meet or exceed contract requirements.
- Bidder stated that their Site Coordinators along with Directors and other staff will be responsible for collecting and reporting data, including the Performance Measures Report and the Narrative Report.
- Bidder stated that they have significant experience participating in Department On-Site Visits and welcome the opportunity to share their work, connect with their State partners and receive feedback and guidance.
- Bidder stated that they will be fully prepared for any on-site visits, as determined by the Department.

2. Staffing

- Bidder provided job descriptions for:
 - Co-director for Maine Alliance for Recovery Coaching (ME-ARC);
 - Program Director for Maine Recovery Core (MRC) – this position is specifically for oversight and coordination of the Maine Recovery Core Internship Program;
 - Program Manager for Maine Alliance for Recover Coaching (MARC) – must hold RCP-F designation or can attain status within a six-month period, reports to the Co-directors for ME-ARC;
 - Program Manager for MRC – reports to the MRC Program Director;
 - Recovery Coach Coordinator for MARC;
 - Recovery Coach (RC) Internship for MRC – multiple monthly meetings are included, and one weekly mentor/mentee meeting and optional Wednesday Help Desk; and
 - Administrative Coordinator (AC) for MARC and MRC – no educational experience identified(/required?), solely requires experience with related duties.
- For all job descriptions, aside from Recovery Coach (RC) Internship for MRC, Bidder included that “experience in personal addiction recovery, or a strong

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INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/12/2024 – 1/25/2024

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

demonstrated personal experience with the recovery process” is preferred/highly recommended.
<ul style="list-style-type: none">• For the RC Internship for MRC job description, Bidder stated that the individual must identify as having Lived Experience in Recovery and identifies as a peer.• Bidder’s job description for Administrative Coordinator (AC) lists the position as both “Full-time” and then further delineates “(20 hours per week)”. In the staffing plan, this position is as “.5” under the “FTE” column. It is unclear to this evaluator if the position is intended to be .5 FTE or 1 FTE.
<ul style="list-style-type: none">• Bidder stated that they will not utilize sub-contractors.
<ul style="list-style-type: none">• Provided, as requested.• 10.5 FTE listed
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided with each task delineated by month and the position responsible for each task.• Most tasks were ongoing and minimal program development and implementation tasks were included.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 2/2/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS/DAFS-ALM

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Have been supporting people since 2001• Have been working with State of Maine since 2017
2. Subcontractors
<ul style="list-style-type: none">• Stated none will be used
3. Organizational Chart
<ul style="list-style-type: none">• Provided full organizational chart
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• They provided multiple certified financial statements
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 2/2/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS/DAFS-ALM

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none">• They state they can meet these requirements
B. Information Technology Requirements
<ul style="list-style-type: none">• They can provide these systems on day 1 of the contract as they currently provide them now.
<ul style="list-style-type: none">• They are compliant now and will ensure other tools, websites are also made compliant if they are not currently.
<ul style="list-style-type: none">• They state they are compliant
<ul style="list-style-type: none">• They will submit any and all required information as identified
<ul style="list-style-type: none">• They are not outside the United States
<ul style="list-style-type: none">• They back up every 24 hours but do not state how long they will be down in the event of a full failure
<ul style="list-style-type: none">• They state Sales force can restore within 24 hours
<ul style="list-style-type: none">• No planned outages
<ul style="list-style-type: none">• They have provided an up time of 99.9+
<ul style="list-style-type: none">• They will meet this requirement.
<ul style="list-style-type: none">• They are the current vendor, no need to transfer data or interrupt services
<ul style="list-style-type: none">• Will provide raw data as necessary at no additional charge
C. Coordination and Collaboration
<ul style="list-style-type: none">• They have a full plan plus sent in an attachment outlining it all.
<ul style="list-style-type: none">• With continued funding they plan on expanding services
<ul style="list-style-type: none">• Community Health Coalition -working since 2001 across the region
<ul style="list-style-type: none">• Maine-ARC will continue to expand and work with all statewide partners, etc.
<ul style="list-style-type: none">• Can fully implement GPRA survey and will be in the workflows, etc.
<ul style="list-style-type: none">• Will ensure it is completed within 30 calendar days.
<ul style="list-style-type: none">• Have trained over 100 community volunteers, back to 2018.
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none">• Included Attachment 8 with full training and supervision plan
<ul style="list-style-type: none">• Supervision is provided and will continue to be provided to all recovery coaches. All well established.
<ul style="list-style-type: none">• Will meet this requirement
<ul style="list-style-type: none">• Trained 1482 people across the state
<ul style="list-style-type: none">• Operate the Maine Recovery Core since 2021, workforce development program

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 2/2/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS/DAFS-ALM

E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none">• Written numerous protocols covered all issues listed.
<ul style="list-style-type: none">• Responsible daily for all requests for TA but will respond within 2 days• Host weekly meetings
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none">• Will provide a monthly PMR and Narrative to the Maine ARC, which will go with the Maine ARC/MRC monthly report
<ul style="list-style-type: none">• They will continue to use the tracking tool they have now. Spreadsheet in a protected drive.
<ul style="list-style-type: none">• They currently track and maintain this
<ul style="list-style-type: none">• Long history of reporting, compliance, implementing policies for state and federal partners.• Will continue with their current data collection software• Will ensure confidentiality of physical or digital copies
<ul style="list-style-type: none">• Written procedures and policies are already written• All records are kept confidential whether digital or paper
<ul style="list-style-type: none">• They currently do this now
<ul style="list-style-type: none">• Any revisions will be provided 10 days to contract start
G. Staffing Requirements
<ul style="list-style-type: none">• Have two CCAR's on staff• Have 5 now with including subcontractors, will not contract out if awarded the contract.
H. Reports
<ul style="list-style-type: none">• Currently in place to meet requirements
<ul style="list-style-type: none">• Will meet these requirements
2. Staffing
<ul style="list-style-type: none">• Provided attachment 9
<ul style="list-style-type: none">• Will not use sub contractors
<ul style="list-style-type: none">• Provided attachment 10
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided attachment 11

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/16/24

EVALUATOR NAME: Kenney Miller

EVALUATOR DEPARTMENT: DHHS - OBH

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Over 20 years of experience with grant management and community programming• Started providing services around SUD in 2017 with Recovery Coaching – indicates exceeding contract deliverables, programming expanded to 5 counties – opened INSPIRE center in July 2021• Prioritizes DEI, including all policies, practices and programs – provides specific examples of DEI strategies• 3 highly relevant projects described in-depth<ul style="list-style-type: none">○ Maine Recovery Core – Recovery Coach coordination, trained over 1,000 individuals in providing peer support○ INSPIRE Center – Recovery Center○ SAFE Harbor – Recovery Residence
2. Subcontractors
<ul style="list-style-type: none">• None identified
3. Organizational Chart
<ul style="list-style-type: none">• High level org chart attached, with sufficient detail to see recovery services
4. Litigation
<ul style="list-style-type: none">• None identified
5. Financial Viability
<ul style="list-style-type: none">• No concerns
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid certificate attached

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/16/24

EVALUATOR NAME: Kenney Miller

EVALUATOR DEPARTMENT: DHHS - OBH

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. Facility(ies) Standards/Requirements	
<ul style="list-style-type: none"> Q - Locations clustered in Downeast, Maine, will this impact capability to ensure coordination service statewide? 	
B. Information Technology Requirements	
<ul style="list-style-type: none"> P - Merging current system to track training data into cloud-based system used to track client activities 	
<ul style="list-style-type: none"> Indicates will assure compliance 	
<ul style="list-style-type: none"> Lacks detail. 	
<ul style="list-style-type: none"> Meets requirement 	
<ul style="list-style-type: none"> Meets requirements 	
<ul style="list-style-type: none"> Meets requirements 	
<ul style="list-style-type: none"> Meets requirements 	
<ul style="list-style-type: none"> Meets requirements 	
<ul style="list-style-type: none"> Meets requirements 	
<ul style="list-style-type: none"> Meets requirements 	
<ul style="list-style-type: none"> P – Current contractor, no transition necessary 	
<ul style="list-style-type: none"> Meets requirements 	
C. Coordination and Collaboration	
<ul style="list-style-type: none"> Directed to attachment 7 	
<ul style="list-style-type: none"> P – Comprehensive communication and collaboration plan attached, including detailed description of efforts to maintain and grow working relationships and referral systems 	
<ul style="list-style-type: none"> P - Incumbent provider with successful track record 	
<ul style="list-style-type: none"> P – Plans to increase # of Program Managers to work with Coordinators 	
<ul style="list-style-type: none"> P – Experience integrating activities and structures among diverse collaborators 	
<ul style="list-style-type: none"> P – Incumbent provider with successful track record 	
<ul style="list-style-type: none"> P – Incumbent provider with successful track record in implementing GPRA 	
<ul style="list-style-type: none"> P – Incumbent provider with successful track record of working with volunteer recovery coaches 	
D. Core Knowledge Training, Supervision, and Workforce Development	
<ul style="list-style-type: none"> Refers to attachment 8 	
<ul style="list-style-type: none"> Indicates will maintain compliance 	
<ul style="list-style-type: none"> P – Incumbent provider with successful track record of meeting expectations 	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/16/24

EVALUATOR NAME: Kenney Miller

EVALUATOR DEPARTMENT: DHHS - OBH

<ul style="list-style-type: none"> • P – Detailed Training and Supervision plan attached, including specific trainings, a timeline in which they will be delivered, and designated staff
<ul style="list-style-type: none"> • P – Coachervision provided more than 1/mo • Indicates meets requirements
<ul style="list-style-type: none"> • P – Incumbent provider, currently meeting expectations
<ul style="list-style-type: none"> • P – Strong track record of providing trainings, demand only growing
<ul style="list-style-type: none"> • P – Has and continues to operate Maine Recovery Core as workforce development program
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • P – facilitate 1.5 hr./week meeting to provide TA to Recovery Coach Coordinators • P - MRC offers support, technical assistance, education, and workforce development • Assures meets requirements
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • P – Surpasses requirements, including reference check, background check, and status of coaching
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • P – Incumbent provider with systems and structures already in place supporting this
<ul style="list-style-type: none"> • P – Surpasses requirements, including collecting contact information, resource of referral, and key dates
<ul style="list-style-type: none"> • Indicates will meet requirements
G. Staffing Requirements
<ul style="list-style-type: none"> • P – Two CCAR facilitators employed since 2016 • Indicates will meet requirements
H. Reports
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Meets requirements
2. Staffing
<ul style="list-style-type: none"> • Directs to attachment • Meets requirements
<ul style="list-style-type: none"> • N/A

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/16/24

EVALUATOR NAME: Kenney Miller

EVALUATOR DEPARTMENT: DHHS - OBH

- | |
|--|
| <ul style="list-style-type: none">• Meets requirements |
|--|

3. Implementation - Work Plan

- | |
|--|
| <ul style="list-style-type: none">• P – Detailed work plan attached, including goals and tasks and who is responsible, as well as the month in which it expected to be completed |
|--|

Part IV, Section IV. Cost Proposal

- | |
|--|
| <ul style="list-style-type: none">• Total cost of \$1.2M/year• Fringe of 44%• Cost proposal includes all required positions as well as Intern Coaches and 2 1.0 FTE co-directors |
|--|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/19&26/2024

EVALUATOR NAME: Lorrie Mitchell, LCSW

EVALUATOR DEPARTMENT: Office of Aging and Disability Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">Positive- Well established organization with strong background in SA Recovery, current relationship with OBH providing peer services.
2. Subcontractors
<ul style="list-style-type: none">NA
3. Organizational Chart
<ul style="list-style-type: none">Submitted
4. Litigation
<ul style="list-style-type: none">No current litigation
5. Financial Viability
<ul style="list-style-type: none">submitted
6. Certificate of Insurance
<ul style="list-style-type: none">submitted

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/19&26/2024

EVALUATOR NAME: Lorrie Mitchell, LCSW

EVALUATOR DEPARTMENT: Office of Aging and Disability Services

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none"> • Unsure if physical locations in all required areas would be met, or if would be virtual?
B. Information Technology Requirements
<ul style="list-style-type: none"> • Positive, has well established and able to begin upon award.
<ul style="list-style-type: none"> • Positive- plans to comply
<ul style="list-style-type: none"> • Positive- plans to meet requirements
<ul style="list-style-type: none"> • Positive- plans to comply and meet required policies
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plans to meet capability
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plants to meet requirement
<ul style="list-style-type: none"> • Positive- system already in place, no transfer will be needed.
<ul style="list-style-type: none"> • Positive- plans to meet requirement
C. Coordination and Collaboration
<ul style="list-style-type: none"> • Positive, provided and comprehensive
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- Current practice in play already
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plans to meet requirement
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none"> • Positive, provided and comprehensive
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- Plans to meet requirement
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • Positive- plans to meet requirement
<ul style="list-style-type: none"> • Positive- plans to meet requirement
F. Recordkeeping, Data Collection/Management, and Supportive Documentation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/19&26/2024

EVALUATOR NAME: Lorrie Mitchell, LCSW

EVALUATOR DEPARTMENT: Office of Aging and Disability Services

• Positive- plans to meet requirement
• Positive- plans to meet requirement
• Positive- plans to meet requirement
• Positive- plans to meet requirement
• Positive- plans to meet requirement
• Positive, includes additional fields
• Positive, states they will comply
G. Staffing Requirements
• Positive, currently meets requirements
H. Reports
• Positive, currently has system in play with current contracts with the department.
•
2. Staffing
• Positive, provided
• Negative- was not able to locate in documents
• Negative- was not able to locate in documents
3. Implementation - Work Plan
• Was not able to locate in documents

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/31/2024

EVALUATOR NAME: Mindy Smith

EVALUATOR DEPARTMENT: Office of Behavioral Health

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – Demonstrated history of meeting contract deliverables held with the Department.• P – Demonstrated history delivering Recovery Coaching services since 2017.• P- Demonstrated history of successful collaboration with outside community partners, including corrections systems, provider agencies and health equity programming.• I – History of collaboration with Maine Tribal Health agencies.
2. Subcontractors
<ul style="list-style-type: none">• N/A
3. Organizational Chart
<ul style="list-style-type: none">• P – Meets requirement
4. Litigation
<ul style="list-style-type: none">• P – No litigation history
5. Financial Viability
<ul style="list-style-type: none">• P – Meets requirement
6. Certificate of Insurance
<ul style="list-style-type: none">• P – Meets requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Healthy Acadia

DATE: 1/31/2024

EVALUATOR NAME: Mindy Smith

EVALUATOR DEPARTMENT: Office of Behavioral Health

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
•
B. Information Technology Requirements
•
• P – Meets Requirement.
• I – Exceeds requirement by ensuring other social media and marketing platforms also adhere to these standards
• P – Meets requirement
• P – Meets requirement
• P – Meets Requirement
• P – Meets requirement
• P – Meets requirement
• P – Meets Requirement
• P- Meets requirement
• P – Meets requirement
• P – Meets requirement
• I – Current vendor, data transfer unnecessary
• P – Meets requirements
C. Coordination and Collaboration
• P- Meets Requirement. Multiple collaborative agencies.
• P - demonstrated integrated recovery coaching programs, Maine-ARC and MRC
• P – Currently networking with over two-hundred (200) community partners.
• P – Demonstrated history of similar program management
• P – Meets requirement
• P – Demonstrated history of meeting requirement
• P – Demonstrated history of quality workforce retention and growth.
D. Core Knowledge Training, Supervision, and Workforce Development
• P- Demonstrated history of meeting recovery coach training requirements.
• P- Demonstrated history of meeting requirements for this section.
• P – Demonstrated history of meeting requirement
• P – Demonstrated history of meeting requirement
• P – 1,482 people trained in various CCAR related models under current contracts.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

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DATE: 1/31/2024

EVALUATOR NAME: Mindy Smith

EVALUATOR DEPARTMENT: Office of Behavioral Health

<ul style="list-style-type: none"> • P – Demonstrated history of workforce development programming since 2021.
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • P – Protocol already in place. Meets requirement.
<ul style="list-style-type: none"> • P – Demonstrated history o meeting TA needs in a timely manner.
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Demonstrated history of meeting requirement
<ul style="list-style-type: none"> • P – Demonstrated history of meeting requirement.
<ul style="list-style-type: none"> • P - History of reporting, compliance and implementing policies with state
<ul style="list-style-type: none"> • P – Written policy and procedures are in place
<ul style="list-style-type: none"> • P – Already using a Department-approved excel spreadsheet housed in a private, protected, HIPAA-compliant Google drive
<ul style="list-style-type: none"> • P – Meets requirement
G. Staffing Requirements
<ul style="list-style-type: none"> • P – Exceeds requirement
H. Reports
<ul style="list-style-type: none"> • P – Demonstrated history of timely reporting to the Department.
<ul style="list-style-type: none"> • P – Demonstrated history of accurate and timely reporting to the Department.
2. Staffing
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • NA
<ul style="list-style-type: none"> • P – Meets requirement
3. Implementation - Work Plan
<ul style="list-style-type: none"> • P – Meets requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/31/24

EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Founded in 1828 – providing peer directed recovery services since 2001• Provides peer support to individuals receiving Behavioral Health Home (BHH) and Acute Community Treatment (ACT) services in 8 communities (I – BHH and ACT peers are required to have Certified Intentional Peer Support Certification – not CCAR Recovery Coach certification)• Indicates plan for expansion of Peer services as part of the Certified Behavioral Health Clinic (CCBHC) model• Indicates success implementing and managing peer recovery services across multiple programs engaging in personal change theory, multiple pathways to recovery, and community engagement (see projects) (Q – unsure if any peer support positions referenced include CCAR Recovery Coach)• Indicates Director of Recovery Services in in recovery – this individual has since resigned from this position and a replacement is being sought by the bidder• <u>Project 1</u> – Peer Support Line – operated Peer Support line since 2010, including expansion to 24/7 coverage• <u>Project 2</u> – Intentional Peer Support in the Emergency Department – providing Peer Support services in one ED since 2005 with expansion into 5 new ED's in 2020 following RFP process• <u>Project 3</u> – CCBHC – federal Substance Abuse and Mental Health Services Administration (SAMHSA) expansion grant in 2020 to <i>Improve Access to Quality Treatment</i>. Focus area Midcoast Maine, ie Northern Coastal Cumberland County, Sagadahoc County, and parts of Lincoln and Androscoggin Counties – project lead named in proposal is no longer with organization• Hired and trained multidisciplinary team to meet this expansion

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 1/31/24

EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

<ul style="list-style-type: none">Established Consumer Advisory Board to reflect the real needs of consumers and family membersEach project listed refers to Certified Intentional Peer Support Specialist positions, not CCAR Recovery Coach as required in this RFP.
2. Subcontractors
<ul style="list-style-type: none">Meghann Perry Group – CCAR Certified trainer of Recovery Coaching
3. Organizational Chart
<ul style="list-style-type: none">2 org charts provided – 1 covering overview of leadership – 1 covering Recovery servicesRecovery Services org chart indicates a position for recovery coach trainer and 6 recovery center locations with recovery coach coordinators and recovery coaching staff associated with each – this evaluator is unclear if or how these centers are related to the services in this RFP
4. Litigation
<ul style="list-style-type: none">8 total suits reported3 suits with the Maine Human rights commission brought by former employees – all settled out of court with payments made5 suits filed by former clients – 1 settled out of court with payment made – 4 suits still open
5. Financial Viability
<ul style="list-style-type: none">Audited financial submitted for years 2019-2020, 2020-2021, and 2021-2022 appear to indicate financial viability
6. Certificate of Insurance
<ul style="list-style-type: none">Provided and current at time of submission – includes professional liability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/31/24

EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. Facility(ies) Standards/Requirements	
<ul style="list-style-type: none"> Indicates that the locations of Recovery Centers identified in RFP #202306142 "Recovery Support Centers" will serve as office locations from which the Recovery Coach Coordination Services will offered Indicates hours of service availability will be M-F 8am-5pm Q – what if the bidder is not awarded one or more of the Center proposals referenced (RFP #202306142 "Recovery Support Centers") 	
B. Information Technology Requirements	
<ul style="list-style-type: none"> Response does not address client data tracking or management 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met Uses Veeam for backup, copied to an off-site repository. Multiple back-up points daily, monitored by agency staff and third party provider 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
<ul style="list-style-type: none"> Met 	
C. Coordination and Collaboration	
<ul style="list-style-type: none"> Response is minimal and lacks detail Response indicates experience serving as the provider of the Peer Training Network Response offers no specifics on practical implementation Response indicates bidder will establish a timeline but offers no details or timeline 	
<ul style="list-style-type: none"> Response addresses 'scaling up' through staff recruiting Response indicates local centers will collaborate with local community partners through the sharing of training and certification information 	
<ul style="list-style-type: none"> Response makes a commitment to deliver these services, but offers no detail on the practical implementation 	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 1/31/24

EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

<ul style="list-style-type: none"> • Response lacks detail
<ul style="list-style-type: none"> • Response does not meet requirement • Response does not indicate that the bidder will complete the GPRA Deliverable Checklist within 30 days of provision of services
<ul style="list-style-type: none"> • Met
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none"> • Response does not address the methods or resources to be used to address this section • Minimal response lacks detail
<ul style="list-style-type: none"> • P – indicates coachervision will be offered weekly • Response does not address affected others • Response does not address resources or methods to be used • Response lacks detail
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • Proposed training reference in this section is unrealistic – RCA is a 30 hour training, and bidder indicates each location will offer it twice each month, in addition to the other trainings, offered multiple times each month at each location – • Total in-person training listed add up to 116 hours • Does not address Recovery Coaching in the Emergency Department • Includes reference to a training “RCP” – this evaluator is unsure what RCP stands for • Q – this evaluator is unsure if the bidder is familiar with the number of hours in each training • Response does not indicate the resources or methods necessary to deliver these trainings
<ul style="list-style-type: none"> • Response indicates participants will have access to job openings for recovery coaches and grants funding for additional training • Response lacks detail • Response does not address resources or methods
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • Minimal response lacks detail • Response does not address resources or methods needed to implement this
<ul style="list-style-type: none"> • Response was minimal and does not address the resources or methods the bidder would utilize to meet this requirement
F. Recordkeeping, Data Collection/Management, and Supportive Documentation

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/31/24

EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

<ul style="list-style-type: none"> Response does not include the methods or resources the bidder would undertake to meet this requirement
<ul style="list-style-type: none"> Met
<ul style="list-style-type: none"> Met
<ul style="list-style-type: none"> Response does not indicate which outcome measure to be used Response does not indicate which platform will be used Does not meet requirement
<ul style="list-style-type: none"> Response does not address use and maintenance of equipment Response does not address training of recovery coaches specific to confidentiality response does not address methods or resources bidder might use to meet this requirement
<ul style="list-style-type: none"> Minimal response lacking in detail Response does not offer resources or methods bidder may employ in order to meet requirement
<ul style="list-style-type: none"> Met
G. Staffing Requirements
<ul style="list-style-type: none"> Response indicates that staff necessary to deliver services will not be in place until at least the second quarter of the contract term
H. Reports
<ul style="list-style-type: none"> Met
<ul style="list-style-type: none"> Met
2. Staffing
<ul style="list-style-type: none"> Job descriptions for 8 different positions included Recovery Coach description indicates that they supervise volunteers
<ul style="list-style-type: none"> Meghann Peery Group – CCAR trainers
<ul style="list-style-type: none"> Staffing plan is a sample weekly coverage chart including only 3 position – unclear how the other positions who job descriptions where included in attachment 9 are related
3. Implementation - Work Plan
<ul style="list-style-type: none"> Implementation plan is written in a timeline using “prior to start date”, “month 1”, “Month 2”, and so on, making it difficult to determine the planned start and completion date for the tasks included Plan indicates RSC open in month 3 – does this indicate a 3 month gap in training and recovery coach coordination services should this bidder be awarded? Q - Plan indicates integration into Recovery Support Center operations during

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Mike Freysinger

EVALUATOR DEPARTMENT: OBH

months 2 and 3 – what would be the impact on this proposal if the bidder is not awarded to provide center service in one or more locations?

- Plan does not address providing coaching services
- Plan does not address providing recovery coaching training outside of staff training

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/25/2024 – 1/31/24

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Bidder stated that they were founded in 1828 as an orphanage and has “evolved” almost 200 years later into a behavioral health organization. Bidder stated that they offer support, hope and treatment to adults, families and children who are experiencing an emotional disturbance, a “mental illness”, or a SUD.• Bidder stated that since July 2001, their organization has been supporting the development and growth of peer-directed recovery services in Maine. Bidder stated that their current peer-run services include community inclusion opportunities; Intentional Peer Support Specialists operating from the Emergency Department at four hospitals; the statewide Peer Support Line (formerly, Intentional Warm Line); and integrated peer supports within Behavioral Health Homes and Assertive Community Treatment teams.• Bidder stated that they have been successfully providing peer support services in Maine-based hospital Emergency Departments for seventeen years at Mid Coast Hospital and recently began working at Mercy Hospital, Central Maine Medical Center, St. Mary's Regional Medical Center and Eastern Maine Medical Center. Bidder stated that in FY23, Intentional Peer Support Specialists engaged with 2,695 participants, and on average, approximately 95% were offered resource information for SUD or peer related support (e.g., Peer Support Line, Peer Recovery Centers, self-help groups and other nonprofit and government agencies).• Bidder stated that since 2010, they have operated the statewide Peer Support Line (PSL); a toll-free phone line operating 24/7, offering adults 18 and older who are experiencing a mental health crisis the opportunity for conversation with an Intentional Peer Support Specialist who has Lived Experience with a “mental illness” and/or SUD and is currently in recovery. Bidder stated that in

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

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DATE: 1/25/2024 – 1/31/24

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FY23, agency staff engaged in 27,995 conversations; of which 9,626 were related to recovery planning and maintenance.

- Bidder stated that in 2016, the State added a Behavioral Health home concept to the array of services that Sweetser can offer to adults experiencing “a severe mental illness”. Bidder stated that this concept identified a team of resource professionals, including a nurse, a clinical social worker, a community integration specialist and a Peer Support Specialist to work jointly with the Behavioral Health Home participants to assist them with their mental health needs. Bidder stated that they have successfully integrated Peer Support Specialists into multiple Behavioral Health Homes serving participants in York, Saco, Sanford, Brunswick, Lewiston, Belfast, Rockland and Portland.
- Bidder stated that as research expands the list of evidence-based and evidence-promising practices for recovery from “mental illness” and/or SUD, Bidder stated that they extend their network of services to include new and proven practices that promote the inclusion of a person with Lived Experience on traditional mental health teams. Bidder stated that the inclusion of a Peer Support Specialist on Behavioral Health Homes and Assertive Community Treatment teams is a constant reminder to the consumer and other team members that recovery is possible. Bidder stated that they are poised to utilize their experience to bring peer support to the emerging Certified Community Behavioral Health Clinic (CCBHC) teams. Bidder stated that the mutuality of a peer relationship, where both individuals have “lived experience” can foster hope that it is possible to move towards the life they envision for themselves.
- Bidder stated that they recognize the value and importance in staffing their multi-mission Recovery Services Division with individuals with shared life experiences. Bidder stated that from management to staff “on the line”, all have demonstrated success in their respective recovery process.
- Bidder stated that furthermore, Division leadership reflects proven success in the development and implementation of programs steeped in personal change theory, multiple pathways to recovery and community engagement. Bidder provided an example: indicating a staff person who works as a Training Specialist for the Peer Training Network, who is in long-term recovery from SUD; this person has spent the last several years engaged in Alcoholics Anonymous sponsorship and service position work. Bidder stated that this staff person also supported women in recovery while working at a residential treatment center in program management.
 - Bidder provided another example; their Director of Recovery Services is also involved in their own recovery process and has spent their career in

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recovery and personal change missions in government and non-government milieus.

- Bidder did not describe their experience addressing needs related to issues of Diversity, Equity and Inclusion.
- Bidder did not describe their experience with culturally-competent and responsive services.

Project 1:

- Bidder referenced their work on the Peer Support Line (formerly Intentional Warm Line) since 2010.
- Bidder stated that when they took over the service, only evening hours were offered and they were able to immediately (no time frame given) expand access to 24/7 service, and the Peer Support Line became the first 24/7 statewide service in the U.S.
- Bidder stated that education and collaboration with mobile crisis providers resulted in a partnership where each service could see the value of the other in the continuum of crisis care. Bidder stated that crisis providers became and still remain the largest referral source to callers.
- Bidder stated that the Peer Support Line (PSL) engages in ongoing collaboration with statewide crisis providers and the State Crisis Line to promote choice and support successful referrals between services.
- Bidder stated that their implementation of PSL was led by their Director at the time, who managed the program for 15 years. Bidder stated that the current Director brings over 20 years of social services experience with nonprofit and government agencies to the division and has his own “lived experience” that he brings to the Recovery Services Division.
- Bidder stated that in 2020, the pandemic resulted in rapid expansion of staff and call capacity. Bidder stated that with the addition of necessary equipment, they increased training and moved to a remote workplace response, allowing them to manage an immediate 27% increase in call volume.
- Bidder stated that post-pandemic, their PSL team continues to collaborate with crisis providers to alleviate stressors on their systems, offer 24/7 access to Mainers, and provide resources to interested callers as reflected in an average of 80 calls a day.

Project 2:

- Bidder referenced their Intentional Peer Support in Emergency Department work, where Bidder stated that they have been successfully providing peer support services in Maine-based hospital Emergency Departments for 17 years.

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- Bidder stated that in 2005 they responded to a State RFP to offer adults experiencing behavioral health, SUD or crisis the option of meeting with a trained Peer Support Specialist in a hospital Emergency Department. Bidder stated that since then, their Peer Support Specialist has worked collaboratively with medical and behavioral health professionals in the Brunswick-based mid Coast Hospital Emergency Department to support patients in crisis.
- Bidder stated that they have had a total of 10,145 behavioral health patient encounters since 2005.
- Bidder stated that in 2020, they leveraged their experience at Mid Coast Hospital to respond to a state RFP to expand the number of Peer Support Specialists available in hospitals across the state. Bidder stated that as a result, they were able to increase supports and make them available at three new sites for a total of four locations: Mid Coast Hospital, Mercy Hospital, Central Maine Medical Center and Eastern Maine Medical Center. Bidder stated that St. Mary's Regional Medical Center is almost ready to "go live" and future plans call for A.R. Gould Hospital and York Hospital to have telehealth capabilities.
- Bidder referenced difficulties of COVID – where hospital attention was focused on patient overflow, providing vaccination clinics and the impact of staff shortages and frequent turnover. Bidder stated that they had to be flexible and creative to keep stakeholders engaged, while being mindful of the focus on keeping the community safe.
- Bidder stated that although unable to implement the program onsite during this time, they were able to continue to build and maintain relationships remotely with each hospital.
- Bidder stated that when they were allowed to begin providing services in the Emergency Departments, they worked in collaboration with each hospital to navigate COVID masking, safety practices, and vaccination requirements.
- Bidder stated that with Department support, they hired several candidates and created a training structure utilizing the Peer Support Line, where they could hone their connection and empathy skills. Bidder stated that they were gainfully employed and learned new skills until there was access to Emergency Departments. Bidder stated that this strategy was successful as the skilled labor shortage increased at the same time the pandemic began decreasing.

Project 3:

- Bidder referred to their Community Behavioral Health Clinic (CCBHC) project, where SAMHSA awarded them a federal expansion grant in 2020 to develop a CCBHC.

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- Bidder stated that their project, Improving Access to Quality Treatment, serves MidCoast Maine in Sagadahoc County, northern coastal Cumberland County and parts of Lincoln and Androscoggin Counties.
- Bidder stated that they subsequently received an award for funding in 2022 to continue advancement and improvement of the CCCBHC model in this region. Bidder stated that implementation of this project was led by their former Chief Growth Officer, who is a licensed clinical social worker with more than a decade of experience in development and oversight of behavioral health services.
- Bidder stated that they are one of 340 CCBHCs nationwide enabling the implementation of comprehensive mental health and substance use treatment. Bidder stated that CCBHCs are entities designed to serve individuals with SMI and SUDs that provide intensive, person-centered, multidisciplinary, evidence-based screening, assessment, diagnostics, treatment, prevention and wellness services.
- Bidder stated that the CCBHC model seeks to ensure access to integrated, evidence-based addiction and mental health services. Bidder stated that this includes 24/7 crisis response and medication-assisted treatment while striving to adhere to stringent criteria regarding timelines of access, quality reporting, staffing, and care coordination with social services, criminal justice, and education systems.
- Bidder stated that they leverage community partnerships with law enforcement, schools, hospitals and other community organizations to improve care, reduce recidivism and prevent hospital readmissions.
- Bidder stated that they integrate additional services to ensure an approach to healthcare that emphasizes recovery, wellness, trauma-informed care and physical behavioral health integration. Bidder stated that these services include but are not limited to: 24/7/365 mobile crisis team services to help people stabilize in the most clinically appropriate, least restrictive, least traumatizing and most cost-effective settings and immediate screening and risk assessment for mental health, addictions and primary care screening to identify and ameliorate the chronic co-morbidities that drive poor health outcomes and high costs for those with behavioral health disorders.
- Bidder stated that the CCBHC model emphasizes tailored care for active duty military and veterans to ensure they receive the unique health support essential to their treatment; expanded integrated care coordination with local primary care providers, hospitals and other health care providers with a focus on whole health and comprehensive access to a full range of medical, behavioral and supportive services and commitment to peers and family,

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recognizing that their involvement is essential for recovery and should be fully integrated into care.

- Bidder stated that their Care Coordinators assist in facilitating communication between providers, monitoring care/needs, supporting the advancement of individualized person-centered care plans and assisting individuals in accessing resources.
- Bidder stated that in implementing the CCBHC, they hired and trained a multidisciplinary team of staff, developed and executed an extensive training plan in evidence-based practice and cultural competency, conducted a community needs assessment and developed practice expectations to promote integration of care.
- Bidder stated that they also established a Consumer Advisory Work Group to support the implementation and ongoing operation of the CCBHC to be reflective of the “real needs” of the consumers and family members to be served.
- Bidder stated that, although Maine is not a “current planning grant state”, they are actively engaged in and focused on creating sustainability plans for CCBHC services beyond the grant period and efforts involve partnership and collaboration with MaineCare, OBH, OCFS and other community providers.

2. Subcontractors

- Bidder included one subcontractor, which Bidder stated is an approved provider in Maine that provides professional, high quality in-person and virtual training to those pursuing Certification in Recovery Coaching using the CCAR curricula.
- Bidder stated that the subcontractor’s trainings are interactive and tailored to the needs of the audience and will prepare participants to carry out their roles in the Centers with Recovery Coaching skills and enhanced professionalism and efficacy in supporting individuals seeking to initiate or sustain recovery.
- Bidder stated that all facilitators of this organization have years of direct experience working in the role of a Recovery Coach within a wide variety of settings in the field of recovery support, as well as extensive training and experience in facilitation.
- Bidder stated that this organization can train up to 30 participants in each class.
- Bidder stated that this subcontractor’s work is well known throughout the field of recovery, and their contact person has partnered with CCAR, Recovery Coach Academy UK, the Association for Addiction Professionals, Peer Recovery Center of Excellence, Massachusetts Bureau of Substance Addiction

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<p>Services' Office of Youth and Young Adult Services, Northeastern University, She Recovers Foundation, and Choice Recovery Coaching.</p> <ul style="list-style-type: none">• Bidder stated that their subcontractor's contact person has also appeared alongside former Director of the Office of National Drug Control Programs, Michael Botticelli, in the CBS News documentary, Faith, Hope and the Burden of Addiction.• Bidder stated that their subcontractor's contact person speaks frequently on issues of social justice at institutions such as the Massachusetts State House, Harvard Law School, and Google.• Bidder stated that their subcontractor's contact person holds a BS in Theatre Education from Emerson College and is one of the first Certified Addiction Recovery Coaches (CARC) in Massachusetts.	
3. Organizational Chart	
<ul style="list-style-type: none">• Provided, unsure if enterprise-wide, and project team intended for this provision of this service is unclear to this evaluator.	
4. Litigation	
<ul style="list-style-type: none">• Eight lawsuits listed, concern regarding litigation.	
5. Financial Viability	
<ul style="list-style-type: none">• Provided consolidated financial statements with independent auditor's report for: June 30, 2021 – 2022; June 30, 2021 – 2020; and June 30, 2020 – 2019.	
6. Certificate of Insurance	
<ul style="list-style-type: none">• Provided Certificate of Insurance on standard ACORD form, included following insurance: Commercial General Liability, Automobile Liability, Umbrella Liability, Workers Compensation and Employers' Liability; and Professional Liability.• All insurance policies end dated with 1/1/24; at the time of this review, this insurance has lapsed.	

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Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none">Bidder stated that they have submitted several responses to RFP#202306142 – Recovery Support Services for Androscoggin, Cumberland, Somerset/Kennebec, Waldo/Lincoln/Knox/Sagadahoc and York Counties. Bidder stated that it is their intention to offer coordinated support for Recovery Coach Services in these locations.Bidder stated that in “each awarded location”, services will be made available Monday through Friday, 8a.m. to 5p.m. local time, except holidays and administrative closings. Bidder stated that on average, services will be open 225 days a year.Bidder did not address if they were not awarded, what office location(s) and hours of operation they would maintain; this is consistent throughout the proposal.
B. Information Technology Requirements
<ul style="list-style-type: none">Bidder stated that “each awarded location” will implement a Department-approved tool (e.g., Excel spreadsheet) to track individual certification, including but not limited to enrollments, certifications, recertifications and other required continuing education requirements. Bidder stated that their tracking tool will be protected by their organization’s IT server with limited access to staff.Bidder did not address the client and management system being provided or maintained within 30 calendar days of the Initial Period of Performance.
<ul style="list-style-type: none">Bidder stated that “each awarded location” will comply with all applicable State of Maine’s Office of Information Technology’s policies as well as maintain compliance with Bidder’s policies and procedures regarding system management and serviceability.
<ul style="list-style-type: none">For physical and environmental protection – Bidder stated that data center access is restricted by job role and access requires badge swipe and key code.For awareness and training – Bidder stated that they require all new employees to successfully complete basic security awareness, anti-phishing and HIPAA security training. Bidder stated that staff are required to successfully complete phishing and security refresher courses every six months; and the organization’s security team conducts quarterly phishing simulations on all organization staff.

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- For planning – Bidder stated that they contract with third party security vendors to monitor, alert and assist in the event of potential security issues. Bidder stated that they maintain an internal security team comprised of the Manager of Network Operations, Systems Administrator, Director of IT, Manager of Client Records, Director of Programs, Chief Financial Officer, and a third-party security consultant.
- For audit and accountability – Bidder stated that their internal security team meets monthly to review critical systems status, systems access and reviews any potential security issues.
- For personnel security – Bidder stated that their user accounts require complex passwords and multi-factor authentication (MFA); and access to PHI is restricted by job role.
- For PII processing and transparency – Bidder noted the following:
 - PHI or PII identified will be caller name and related data; PHI or PII will be stored in either iCarol “(the web-based program used by Bidder’s Peer Support Line to store pertinent information and general notes) or the organization’s EHR; only staff who need access to PII or PHI to perform job function will have access; they will create an acceptable use policy that determines how, where and when this data is used by staff; configure encryption and secure access – determining how staff verify their identity and obtain security compliance verification from iCarol or their organization’s EHR; and end user training, where Bidder states they have security training at onboarding and throughout the year, and also has HIPAA specific training requirements for all staff.
- For contingency planning – Bidder stated that they have a primary and secondary data center, in the event of the primary data center failure, the secondary one is brought online. Bidder stated that their mission critical applications are available via secure cloud access with MFA.
- For identification and authentication – Bidder stated that each user has their own unique User ID and password, and passwords are complex and require MFA.
- For incident response – Bidder stated that were an incident is detected or reported, their security team is alerted, and next best course of action is determined.
- For system and communications protection – Bidder stated that all organization servers and computers are protected by firewalls, antivirus and anti-malware; and their firewalls scan traffic utilizing intrusion protection, gateway antivirus.
- For maintenance – Bidder stated that their organization’s hosted electronic health record (EHR) is maintained via the EHR vendor; and their internal

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<p>systems follow a regular monthly schedule of security patching and updates to maintain compliance.</p> <ul style="list-style-type: none">• For system and information integrity – Bidder stated that their systems follow a routine back-up schedule; local back-ups are replicated offsite to the secondary data center; and they maintain complete site replication between primary and secondary data centers.• For media protection – Bidder stated that staff do not use physical removable media to store or transport PHI.• For supply chain risk management – Bidder stated that they follow best practices when selecting vendors, as recommended by the FCC and Homeland Security.
<ul style="list-style-type: none">• Bidder stated that each location will maintain compliance with Sweetser and Department policies and procedures regarding system management and be able to submit supporting documentation and data reports to support compliance in a timely manner.
<ul style="list-style-type: none">• Bidder stated that all data will be stored using a Microsoft server, located within the Continental United States.
<ul style="list-style-type: none">• Bidder stated that they use Veeam for backup and recovery; and data is backed up daily across the agency to a local back-up repository.• Bidder stated that data backups are then copied to an offsite repository each evening.• Bidder stated that their organization maintains multiple restore points for each data backup; and data backups are monitored by their organizations' staff and a third-party service provider to ensure consistency and reliability.
<ul style="list-style-type: none">• Bidder stated that they are able to recover data from multiple restore points within a twenty-four-hour window.• Bidder stated that data backups are monitored by their organizations' staff and a third-party service provider to ensure consistency and reliability.
<ul style="list-style-type: none">• Bidder stated that downtime is limited to one planned maintenance window per month and the Bidder's organization will seek pre-approval by Department authorities prior to any planned outages.
<ul style="list-style-type: none">• Bidder stated that they are able to meet this metric for its locally stored data.• Response lacked detail.
<ul style="list-style-type: none">• Bidder stated that they will complete and submit to Department authorities an annual full SSAE16 SOC 2 Type 2 annual audit.
<ul style="list-style-type: none">• Bidder stated that planned downtime is limited to one maintenance window per month.

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- Bidder stated that for unplanned downtime, they are able to recover data from multiple restore points within a twenty-four-hour window. Bidder stated that backups are monitored by Bidder's staff and a third-party service provider to ensure consistency and reliability.
- Bidder stated that they have both the data storage capacity and IT services necessary to receive the suggested amount of data noted from the previous vendor.
- Bidder stated that they will transfer seven years of data into the new system.
- Bidder did not address ensuring a smooth transition such that there is no (or negligible) interruption in service.

- Bidder stated that "each awarded location and/or [Bidder] will be well positioned to provide the Department with raw data in an XML format upon request.

C. Coordination and Collaboration

- Bidder referred the reader to their Attachment 7 – Communication and Collaboration Plan.
- Bidder provided their Attachment 7 – Communication and Collaboration Plan.
- Bidder stated that over the course of their history, they have demonstrated a commitment to interorganizational collaboration.
- Bidder stated that they intend on operationalizing similar strategies as their Peer Training Network project for this "mission".
- Bidder stated that specifically, they will establish a timeline:
 - To inform other nonprofit agencies involved in recovery services about their plan (to include the development of protocols and communication systems);
 - To inform the Recovery Coach community through various social media platforms on the availability of trainings and the protocol necessary to access them; and
 - To track, store and share credential information to both parties.
- Bidder did not include individuals and/or organizations Statewide that the Bidder would engage with to establish working relationships, protocols, and systems of referral and systems of referral and engagement with volunteer and paid Recovery Coaches; Bidder solely mentioned that they would establish a timeline for such, no further detail included.
- Aside from mention of timeline establishment, Bidder did not describe how they would collaborate with individuals and/or organizations in each identified county to create and maintain working relationships, protocols, and systems of referral and engagement with volunteer and paid Recovery Coaches.

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<ul style="list-style-type: none">• Bidder stated that each location's mission will reflect a commitment to collaborate with community partners to better assist them in maintaining their own staffing requirements through the sharing of information pertaining to Recovery Coach certification and recertification, updates on training seminars, Recoveree-related topics and issues "and any other related matters".• Bidder stated that each location will be consistently engaged in staff recruitment and program research and development to appropriately "scale up" in order to respond to increases in interest in RCS.• Aside from stating that "each location's mission" will reflect a commitment to collaborate, Bidder did not specifically describe how they would coordinate scheduling with RCS locations and community partners to implement RCS.
<ul style="list-style-type: none">• Bidder stated that each location will operate "similar strategies" using their agency's Peer Training Network mission to achieve success in implementing the RCS program across the State.• Bidder stated that, specifically, they will: inform other nonprofit agencies involved in recovery services about their coordination plan (to include the development of protocols and communication systems); inform the Recovery Coach community through various social media platforms on the availability of trainings and the protocol necessary to access them; and track, store and share credential information to both entities. Bidder stated that by meeting these three objectives, each location's performance will reflect multi-pronged support design for Recovery Coaches and Recoverees.• Bidder stated that each location will facilitate training in an organized and timely manner to meet the goals established in the contract, will also "best serve Coaches and Recoverees" (?), and establish a referral network that exhibits policies and procedures reflective of the mission, a sound monitoring and evaluation plan, a solid communication plan, and organizational partnerships.• Aside from sharing of information with agencies involved in recovery services, Bidder did not address how they would synchronize and integrate activities, responsibilities and structures to ensure the resources of each RCS is used most efficiently in pursuit of the RSC goals.
<ul style="list-style-type: none">• Bidder stated that the GPRA standard requires agencies to engage in performance management tasks such as setting goals, measuring results and reporting progress.• Bidder stated that each location will possess both a strategic and performance plan, and routinely conduct gap analysis to ensure they are effectively connecting with their community partners, the Recovery Coach community and Recoverees. Bidder did not describe how often gap analysis would be

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<p>conducted, and if it would be done through the Bidder or by community partners, themselves. Bidder also did not delineate if strategic and performance plans and gap analysis would be conducted in relation to GPRA requirements, general compliance overall, or something separate.</p> <ul style="list-style-type: none">• Bidder did not address ensuring RCS staff implementing RCS services in compliance with GPRA requirements, including ensuring that Recovery Coaches complete the GPRA Deliverable Checklist within 30 calendar days of the start of providing services under the contract resulting from this RFP.
<ul style="list-style-type: none">• Bidder stated that effective volunteer recruitment helps drive an agency's mission, ensure organizational success and "further integrate the agency into the surrounding community."• Bidder stated that each location will be poised to implement the following strategies:<ul style="list-style-type: none">○ Establish defined goals and responsibilities of the volunteer program;○ Coordinate an effective marketing plan through Bidder's Communication Division;○ Individualize schedules to accommodate need;○ Streamline the onboarding process;○ An open and informative communication system consisting of emails, SMS and social media; and○ Utilize social media, Indeed and the Peer Training Network to recruit.• Response lacked detail.
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none">• Bidder stated that they will ensure all Recovery Coaches complete CCAR RCA prior to the delivery of RCS.• Bidder stated that they will ensure all Recovery Coaches complete CCAR ECRC within nine months of hire.• Bidder stated that all Recovery Coaches shall participate in ongoing Recovery Coaching.• Bidder provided Attachment 8 – Training and Supervision Plan.• Bidder stated that CoacherVision will be provided "at each awarded location" by a Recovery Coach Coordinator after they have been trained to facilitate the course.<ul style="list-style-type: none">○ Bidder stated that to accomplish this, an outside Recovery Coach trainer (e.g., subcontractor) will be retained to provide an in-person "Train the Trainer" course to Recovery Coach Coordinators at a centralized location. Bidder stated that, hence, CoacherVision will be facilitated in-person "at awarded locations".

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<ul style="list-style-type: none">○ It is unclear if Bidder will provide CoacherVision via online or hybrid modalities as well, or if they will only be providing CoacherVision in person.● Bidder stated that CCAR RCA will be provided quarterly by a Recovery Coach trainer; with three trainings to be facilitated remotely and one in-person training offered annually.● Bidder stated that the RCA will be followed up by ECRC and will be offered remotely as well.● Bidder stated that, supervision is a professional and collaborative effort between supervisor and staff member to promote a shared understanding of the work environment, promote competency, and exchange information and ideas. Bidder stated that in the “recovery area”, these components expand to include ethical delivery of services and supports through continuous personal development in the Recovery Coach discipline.● Bidder stated that “in each awarded location”, the primary role of each Coach Coordinator will be to reflect “the above-mentioned principles” while offering supervision in a manner that will be organized and straightforward.● Bidder stated that Coach Coordinators will facilitate CoacherVision on a monthly basis and will ensure RCS model fidelity (through CoacherVision) and ensure Coaches are suitably matched with Recoverees.● Bidder did not describe developing CoacherVision locations/environments as specific needs emerge.● Training and supervision plan lacked details.
<ul style="list-style-type: none">● Bidder stated that each location will ensure the items mentioned in this response throughout the contract.● Bidder stated that CoacherVision will be offered on a weekly basis. Bidder also referred reader to “Question 4”, this Evaluator is unsure what this is referring to. Bidder also stated in their Attachment 8 – Training and Supervision Plan that Coach Coordinators would provide CoacherVision on a monthly basis, it is unclear to this evaluator if CoacherVision will be offered weekly or monthly.● Bidder stated that Recovery Coaches register with the MRCCB and keep their organization’s Training Division informed on credential status and training activity.● Bidder stated that Recoverees receive recovery-related information and resources through 1:1 engagement or group distribution, and Recovery Coach services are provided as outlined in the RCS agreement.● Bidder stated that CoacherVision will be offered on a weekly basis and the model will be adhered to. As previously mentioned, unclear if CoacherVision

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<p>would be offered weekly or monthly as the Bidder's provided Attachment 8 – Training and Supervision Plan stated it would be provided on a monthly basis.</p> <ul style="list-style-type: none">• Bidder stated that when partnered with a Recoveree, their organization's Recovery Coach will be expected to promote their recovery, assist in removing barriers, connect them to additionally recovery support services and encourage hope, optimism, and healthy living.• Bidder stated that a RCC will strive to best match a Recoveree with a Recovery Coach based on factors such as shared life experience(s), expertise in areas of need, experience in recovery (if necessary), socio-cultural similarities, and demographics (if necessary).• Bidder stated that all Recovery Coaches will demonstrate skillful coaching techniques, create and maintain the coaching partnership defined in the Coaching Agreement and be in alignment with the Recovery Coaches Code of Conduct. Bidder did not address administration of RCS request procedures.• Bidder stated that each RCC will ensure initial meetings with potential Recoverees take place to discuss programs and services offered at the location as well as opportunities for Recovery Coach trainings once ready to participate. Bidder did not address ensuring each Recovery Coach conducts initial placement meetings with potential Recoverees, ensuring quality of intake and screening processes; Bidder only addressed the initial meeting with potential Recoverees, not the initial placement meeting.
<ul style="list-style-type: none">• Bidder stated that "each awarded office" will implement monthly 1:1 engagement between the RC and RCC to strengthen and further enhance the skill level of each individual.• Bidder stated that this collaborative effort will focus on peer work knowledge, project management skill development, facilitator strategies and SAMHSA values and principles.• Bidder stated that there will be biweekly supervision between RCs and peers. This evaluator is unsure if this is referring to Recovery Coaches providing supervision to peers biweekly, or something separate.
<ul style="list-style-type: none">• Bidder stated that "awarded locations" will maintain robust and consistent training programs.• Bidder stated that each site will offer: CCAR Basics once a week, onsite; CCAR RCA twice a month, onsite; CCAR ECRC twice a month onsite and once a month via remote access; CCAR RCP biweekly; CoacherVision once a week, onsite; and Department-approved CART programming information and/or updates.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/25/2024 – 1/31/24

EVALUATOR NAME: Anna Ko

EVALUATOR DEPARTMENT: Office of Behavioral Health

<ul style="list-style-type: none">• Bidder only referred to provision of CART programming information and updates, unclear if Bidder would provide CART program training agreed upon with the Department as well, as required.• Bidder did not address provision of hybrid and/or online training (aside from CCAR ECRC), should any anticipated locations not be awarded, in order to ensure access to statewide training.
<ul style="list-style-type: none">• Bidder stated that by 2030, it is projected that there will be a 15% increase in demand for those that support individuals in the recovery process (no source cited).• Bidder provided the definition for workforce planning, per the Society for Human Resources Management.• Bidder stated that their “awarded location(s)” will maintain robust and consistent training programs.• Bidder stated that specifically, each “awarded location” will offer: CCAR Basics once a week, onsite; CCAR RCA twice a month, onsite; CCAR ECRC twice a month onsite and once a month via remote access; CCAR RCP biweekly; CoacherVision once a week, onsite; and CART programming information and/or updates.• Bidder stated that participants will have access to job openings information for Recovery Coaches and grant opportunities for trainings.• Bidder stated that throughout the life of the contract, “each awarded location” will routinely test and monitor this plan to identify progress and/or areas in need of improvement, and to respond effectively and timely to any change in workforce needs. Timeline and frequency for routine testing was not described and Bidder did not describe how they would test “this plan” to identify progress and/or areas of improvement, aside from stating such.• Bidder’s response lacked detail regarding how they would create and implement a workforce development program for Recovery Coaches to be trained and placed in the field.
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none">• Bidder stated that “each awarded location’s vision” will be to develop a WA/TA program that will ensure the Recovery Coach community is served in a manner that allows for each individual to support and promote a Recoveree’s or Affected Other’s journey to wellness.• Bidder stated that included in their QA/TA program will be the development of a Recovery Capital model that will be submitted to the Department for review and approval within three months of the awarded contract.

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INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Office of Behavioral Health

- Bidder stated that written protocols will be drafted that specifically target individuals for service who are at high risk of opioid-related overdose or who have recently experienced an overdose event.
- Bidder stated that through routine management system reviews, performance evaluation surveys, data audits, and pulse surveys, their coordination and information will demonstrate a continuous improvement in the coordination of Recovery Coach training. Timeframes and frequency for surveys, audits and reviews were not provided.
- Bidder stated that their intent is to establish a continuous assessment of each certified individual's Recovery Capital that will support their goals of long-term sobriety, particularly for those individuals who self-report as a high risk of opioid-related overdose or have recently experience d an overdose event.
- Bidder stated that the Department and internal managers of data will be provided access to each location's protocols and future recommended changes for review and approval.
- Bidder did not address ensuring Department approval prior to implementation and following any changes.

- Bidder stated that the purpose of a TA program for Recovery Coaches is to support the integration of peer services into [word/text cut off] "awarded location, helping to build and strengthen the location's delivery of services to the recovery community through the Recovery Coach workforce. This evaluator is unclear as to the intent of this statement due to missing text.
- Bidder stated that it is their intent to demonstrate the ability to meet "such goals" by offering their staff: increased access to additional evidence-based practices through the transfer of knowledge process (process not described); educational resources that will expand their lens on diversity, equity and inclusion in their work as coaches; skill training; and mentorship.
- Bidder stated that TA sessions will take place monthly, will not be limited to internal staff only, and will be facilitated by a trained Recovery Coach Coordinator.
- Bidder stated that it would be during the monthly TA sessions "that the transfer of knowledge and skill will take place."
- Bidder stated that each TA request will be responded to within two business days by email and/or phone.

F. Recordkeeping, Data Collection/Management, and Supportive Documentation

- Bidder stated that documentation of all data required for Performance Measures will be collected for quarterly reporting purposes.

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BIDDER NAME: Sweetser

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<ul style="list-style-type: none">• Bidder stated that data collection will include but is not limited to: Recovery Coach training participation, CoacherVision, improvement or decline of recovery capital outcomes, community outreach, referral resources and volunteer recruitment.• Bidder stated that this information will be monitored and submitted for the Department's review using the RCS Performance Measure Reporting Template.
<ul style="list-style-type: none">• Bidder stated that CoacherVision hours will be documented utilizing a secured Excel spreadsheet and be accessible to the Department upon request.• Bidder stated that the document will be maintained and updated by the Coach Coordinator responsible for providing CoacherVision services.• Bidder stated that this tracking tool will be used to monitor participation, date and each Recovery Coach's engagement in CoacherVision.
<ul style="list-style-type: none">• Bidder stated that "each awarded location" will comply with this requirement by developing and maintaining a locally managed and Department-approved tracking worksheet to support the reporting process and assist trainees in meeting their certification goals and requirements.
<ul style="list-style-type: none">• Bidder stated that "each awarded location" will ensure completion of the RCS outcome measure at the outset of intervention and once every thirty calendar days thereafter for each recoveree participating in RCS services.• Bidder stated that "each awarded location" will create and maintain or utilize data collection software specific to RCS that will be approved by the Department to ensure efficient and accurate reporting of outcome measures data.• Bidder stated that "each awarded location" will ensure physical and digital copies of each outcome measure used in reporting are stored for the duration of the contract and in accordance with confidentiality of information guidelines established in 42 C.F.R. Part 2 Final Rule, other applicable sections of State and federal law and regulations, HIPAA requirements and Bidder's own policies and procedures.• Bidder did not address providing said data to inform the Department of outcome measurements.• Minimal response.
<ul style="list-style-type: none">• Bidder summarized the importance of documentation.• Bidder stated that "all awarded locations" will develop and maintain policies and procedures that highlight the "who, what, when, where, how, why" of each interaction, strengthening a continuity of care model.

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<ul style="list-style-type: none">• Bidder stated that written policies and procedures will outline collaboration, communication, and expectations regarding placement and referral and recovery maintenance.• Bidder stated that their approach will also include “pathways to certification” for those interested in the CCAR training expertise.• Bidder did not address creating and implementing written policy and procedure regarding the use and maintenance of equipment and documenting training of Recovery Coaches in all applicable requirements regarding confidentiality.• Minimal response.
<ul style="list-style-type: none">• Bidder provided a summary of the importance of Peers working as Peer Recovery Coaches, with source cited.• Bidder stated that procedurally, through the Recovery Coach-Recoveree dynamic, Coaches will gather sufficient information on Recoverees to address: Recoveree’s identification; date, time and duration of contact; who participated in the session; and location of the contact (e.g., session).• Bidder stated that all Coaches and volunteers will document their interaction with Recoverees in a Microsoft Excel Worksheet or iCarol’s “Client Profile” section.• Bidder did not address creating and maintaining Recoveree records that include a brief summary of all contacts and a list of contacts with the RCS provider and/or community providers.
<ul style="list-style-type: none">• Bidder stated that “each awarded location” will be positioned to submit policies and procedures particular to this contract within ten days (business or calendar? Bidder did not specify) of the contract start date and will comply with the requirement that any revision(s) be submitted to the Department for review and approval prior to implementation.
G. Staffing Requirements
<ul style="list-style-type: none">• Bidder stated that “each awarded location” will have a two-prong approach to staffing requirements.• Bidder stated that first, leadership will seek CCAR-certified staff to operationalize an Academy and Ethical Considerations at the offset of the contract; and the “second prong” will introduce a planned training response to ensure proper staffing requirements are maintained moving forward.• Bidder stated that, specifically, in Quarter Two of the grant year, a minimum of two staff will be certified through a subcontractor.• Bidder stated that by Quarter Two, the five Recovery Coach Coordinators hired to oversee Recovery Coach services will be required to obtain certification from CCAR to provide CoacherVision.

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H. Reports
<ul style="list-style-type: none">• Bidder stated that “each awarded location” will track participant’s “certification pathway”, participant demographic information, program information, and other operational information through a tracking worksheet that will result in a monthly Performance Measure Report; and a Narrative Report.• Bidder stated that Department onsite visits will be an opportunity for Department authorities to physically experience program and participant success at each location. Bidder stated that this platform will allow each location to report out in an accurate and timely manner.
<ul style="list-style-type: none">• Bidder stated that “each awarded location” will have the ability to track each participant’s “certification pathway”, participant demographic information, program information and other operational information through an Excel tracking worksheet.• Bidder stated that this platform will allow each location to report out in an accurate and timely manner.
2. Staffing
<ul style="list-style-type: none">• Job descriptions provided.• Job descriptions for Recovery Coach Trainer and Coach Coordinator positions both require Lived Experience with the process of Recovery from trauma and SUD and is willing to self-identify with peers on this basis in the community.
<ul style="list-style-type: none">• Bidder stated that “each awarded location” will have a two-prong approach to staffing requirements.• Bidder stated that first, leadership will seek CCAR-certified staff to operationalize an Academy and Ethical Considerations at the offset of the contract; and the “second prong” will introduce a planned training response to ensure proper staffing requirements are maintained moving forward.• Bidder stated that, specifically, in Quarter Two of the grant year, a minimum of two staff will be certified through a subcontractor.• Bidder stated that by Quarter Two, the five Recovery Coach Coordinators hired to oversee Recovery Coach services will be required to obtain certification from CCAR to provide CoacherVision.• Bidder did not address oversight and management of their subcontractor.
<ul style="list-style-type: none">• Staffing plan provided, with staff work schedules (Monday – Friday, 8a.m. to 4p.m.) included.• Bidder did not include a description on how proposed minimum staffing requirements/qualifications will be met.• Bidder’s staffing plan only includes two FTE Recovery Coach Coordinators and one “CCAR RCA Trainer”; however, the RFP requires the Bidder to employ

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and/or subcontract a minimum of two staff certified by CCAR to facilitate RCA and ECRC; and a minimum of five Recovery Coach Coordinators who are certified CoacherVision facilitators. Bidder also stated elsewhere in the proposal that they would subcontract two trainers and hire five Coach Coordinators, Bidder's intended staffing plan is unclear to this evaluator.

3. Implementation - Work Plan

- Provided work plan.
- Bidder did not use exact dates in their work plan, instead using the following vernacular: "Prior to Start Date"; "Weekly"; "Month 1", "Month 2", "2x Year", "Month 1 & 2"; "Month 12"; "One-Time"; "Monthly"; "Annually"; "Month 1 & on"; "Quarter 1"; "Quarter 2"; and "Point in Time". Non-specified dates made it difficult to easily interpret when, during the initial period of performance, certain activities would be completed.
- Bidder categorized their work plan based on different themes, e.g., "Staff Training"; "Outreach", "Advisory Board" and "Evaluation & Reporting".
- Bidder did not delineate work to be completed by the subcontractor.
- Bidder included minimal program development and implementation tasks; most tasks listed were ongoing.
- Bidder did not include in the workplan that written policies and procedures would be submitted to the Department for approval within ten business days of contract start date.
- Bidder stated in their proposal that they would have to hire five Center Coordinators and subcontract for two training staff, this task was not included in the work plan, and it is unclear when the Bidder intends to be fully staffed and able to provide services.
- Bidder included positions responsible for each task.

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RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/31/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">Established in Maine almost 200 years agoProvide peer support services in ED departments for 17 yearsExtensive experience working with State of Maine and local Maine groups and hospitalsOperate the statewide Peer Support Line since 2010
2. Subcontractors
<ul style="list-style-type: none">Meghann Perry Group, located in Mass. Provide Recovery coaching certification.No others listed
3. Organizational Chart
<ul style="list-style-type: none">Provided a full organizational chart
4. Litigation
<ul style="list-style-type: none">Numerous lawsuits listed
5. Financial Viability
<ul style="list-style-type: none">Provided certified financial statements, appear to be financially viable
6. Certificate of Insurance
<ul style="list-style-type: none">Provided

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EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none">• Will provide office locations in multiple counties• Will operate Monday through Friday 8 am to 5 pm local time
B. Information Technology Requirements
<ul style="list-style-type: none">• Will implement a department approved tool in each location• Will be protected with limited access to staff
<ul style="list-style-type: none">• They state they will comply with SOM's listed IT policies
<ul style="list-style-type: none">• A. DC access restricted by Job role, badge• B. Employees have security and HIPAA training, refreshers• C. 3rd party security vendors and internal security team• D. Internal security team meets monthly• E. Complex passwords, MFA, PHI access is restricted• F. Identify PII, storage, access, create a policy, encryption, training• G. 2 data centers, secure cloud, MFA• H. No shared logins, MFA• I. Team is alerted to incidents• J: Servers are Firewalled, intrusion protection• K. EHR vendor, schedule of patching• L. Backup schedule, offsite, site replication• M. No removable media stores PHI/PII.• N. Follows best practices selecting vendors
<ul style="list-style-type: none">• Each location will be able to submit supporting documentation
<ul style="list-style-type: none">• All data will be stored within the USA
<ul style="list-style-type: none">• Data is backed up daily, copied offsite every evening. Maintain multiple restore points. Use a 3rd party provider to ensure reliability.
<ul style="list-style-type: none">• Multiple restore points well within 24 hour window.
<ul style="list-style-type: none">• 1 planned maintenance window per month and will ask for pre-approval from SOM
<ul style="list-style-type: none">• Able to meet this metric
<ul style="list-style-type: none">• Will complete and submit annual audit to meet this requirement
<ul style="list-style-type: none">• Have data storage capacity and IT services to receive data from previous vendor• Will transfer 7 years into new system
<ul style="list-style-type: none">• Will provide to the department with raw data in XML format

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C. Coordination and Collaboration
<ul style="list-style-type: none">• See attachment 7
<ul style="list-style-type: none">• Each location will meet these needs
<ul style="list-style-type: none">• Each location will operate to achieve success in implementing the RCS program across the SOM.• Multi pronged support design for Recovery Coaches and Recoverees• Each location will meet the goals and best serve the contract, and establish a referral network.
<ul style="list-style-type: none">• Each location will possess strategic and performance plans to meet these requirements
<ul style="list-style-type: none">• Each location will be driving volunteer recovery coaches plus they listed additional strategies
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none">• Will ensure all complete prior to delivery of RCS. Ensure all coaches complete the CCAR ECRC within 9 months, and participate in ongoing training.
<ul style="list-style-type: none">• Will offer coachervision weekly, have recovery coaches register, agreed to everything on this list.
<ul style="list-style-type: none">• Agree with effective supervision for retention, productivity, will do one on one engagements monthly.
<ul style="list-style-type: none">• Will maintain robust and consistent training programs. Listed all their training and when it will be offered.
<ul style="list-style-type: none">• Repeated question 4 and answer – all of their training and when it will be offered. Will test and monitor this plan and respond to any changes in workforce needs.
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none">• Will develop a QA/TA program – will submit to department within 3 months of contract start. They will demonstrate continuous improvement. Will provide written protocols for specifically targeted individuals.
<ul style="list-style-type: none">• Will host monthly meetings, will respond within 2 business days
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none">• All data will be collected for quarterly reporting
<ul style="list-style-type: none">• Secured excel spreadsheet, will be used to track coachervision
<ul style="list-style-type: none">• Each location will maintain tracking worksheet to include this info
<ul style="list-style-type: none">• Each location will ensure completion of the RCS outcome• Each location will create/maintain and utilize data collection that is approved• Each location will ensure confidentiality

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EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

• Documentation provides a crucial role and it will meet as requested.
• Coaches will gather sufficient information on recoverees
• Agreed and will comply
G. Staffing Requirements
• Two prong approach to staffing requirements. Min of 2 staff will be certified within qtr 2, and the 5 will be required to obtain certification for coachervision
H. Reports
• Will comply with report requirements
• Will comply with requirements
2. Staffing
• Provided in detail
• Provided
• Provided attachment 10
3. Implementation - Work Plan
• Provided attachment 11

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/16/24

EVALUATOR NAME: Kenney Miller

EVALUATOR DEPARTMENT: DHHS - OBH

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – Supporting peer-directed recovery services since Jul 2001• P – Operating statewide peer support line since 2010, providing peer support services in hospital EDs for 17 years• N – Lacks detail re: DEI and culturally competent and responsive services outside of people with lived experience• Describes three related projects<ul style="list-style-type: none">○ Peer support line○ IPS in Emergency Departments○ CCBHCs
2. Subcontractors
<ul style="list-style-type: none">• Subcontract with Meghan Perry Group – provides CCAR trainings
3. Organizational Chart
<ul style="list-style-type: none">• Provided part of enterprise wide organizational chart and specific chart for recovery support services
4. Litigation
<ul style="list-style-type: none">• 8 filings in the past 5 years, including 3 employees and 5 clients• 3 settled out of court, 3 still open
5. Financial Viability
<ul style="list-style-type: none">• Assets upwards of \$39M• Dip in net assets in 2022, larger increase in 2022
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid certificate of insurance included

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202307151

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BIDDER NAME: Sweetser

DATE: 1/16/24

EVALUATOR NAME: Kenney Miller

EVALUATOR DEPARTMENT: DHHS - OBH

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. Facility(ies) Standards/Requirements	
<ul style="list-style-type: none"> Indicates will meet requirements Q – Is this contingent on receiving the other award applied for? 	
B. Information Technology Requirements	
<ul style="list-style-type: none"> Indicates will meet requirements Q – Is this contingent on receiving the other award applied for? 	
<ul style="list-style-type: none"> N - Response lacks detail 	
<ul style="list-style-type: none"> P – Provides description of how bidder will meet all requirements of NIST 800-53 Rev 5 	
<ul style="list-style-type: none"> Indicates will meet requirements 	
<ul style="list-style-type: none"> Indicates will meet requirements 	
<ul style="list-style-type: none"> Indicates will meet requirements 	
<ul style="list-style-type: none"> N – Does not address the 24 hour backup requirement 	
<ul style="list-style-type: none"> Indicates ability to meet the requirement 	
<ul style="list-style-type: none"> Indicates ability to meet the requirement 	
<ul style="list-style-type: none"> Indicates ability to meet the requirement 	
<ul style="list-style-type: none"> Response lacks detail 	
<ul style="list-style-type: none"> Indicates ability to meet the requirement 	
<ul style="list-style-type: none"> N – Does not address item a 	
<ul style="list-style-type: none"> Indicates will meet requirements 	
<ul style="list-style-type: none"> Q – Is this contingent on receiving the other award applied for? 	
C. Coordination and Collaboration	
<ul style="list-style-type: none"> Directs to attachment 7 – Communication and Collaboration plan does not discuss how bidder will establish working relationships, protocols, and systems for referral and engagement with volunteer and paid recovery coaches 	
<ul style="list-style-type: none"> Indicates will meet requirements 	
<ul style="list-style-type: none"> Q – Is this contingent on receiving the other award applied for? 	
<ul style="list-style-type: none"> N – Response lacks detail 	
<ul style="list-style-type: none"> Q – Is this contingent on receiving the other award applied for? 	
<ul style="list-style-type: none"> N – Response lacks detail regarding data collection 	
<ul style="list-style-type: none"> Indicates will meet requirements 	
<ul style="list-style-type: none"> P – Provides brief description of various volunteer recruitment tools they will utilize 	
D. Core Knowledge Training, Supervision, and Workforce Development	

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<ul style="list-style-type: none"> • Indicates will meet requirements • Attachment 8 – <ul style="list-style-type: none"> ○ N - only indicates that four trainings will be offered. ○ N – Supervision plan lacks detail, states supervision philosophy but does not adequately describe how supervision will be provided
• Indicates will meet requirements
• Indicates will meet requirements
• Indicates will meet requirements
• N – Response lacks detail beyond providing training
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • N – indicates assessing certified individual's recovery capital • N- Response lacks detail
<ul style="list-style-type: none"> • P – Discusses TA provision available to RC and RCCs including training and mentorship
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
• Indicates will meet requirements
• Indicates will meet requirements
• Indicates will meet requirements
<ul style="list-style-type: none"> • Indicates will meet requirements • Q – Is this contingent on receiving a complementary award?
<ul style="list-style-type: none"> • Indicates will meet requirements • N – Response lacks detail regarding communications, collaboration, and equipment and trainings
• Indicates will meet requirements
<ul style="list-style-type: none"> • Indicates will meet requirements • Q – Is this contingent on receiving a complementary award?
G. Staffing Requirements
<ul style="list-style-type: none"> • Indicates will meet requirements • Q – Is this contingent on receiving a complementary award?
H. Reports
<ul style="list-style-type: none"> • Indicates will meet requirements • Q – Is this contingent on receiving a complementary award?
<ul style="list-style-type: none"> • N – Response does not address the question
2. Staffing
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • N – Response does not address question

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RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 1/16/24

EVALUATOR NAME: Kenney Miller

EVALUATOR DEPARTMENT: DHHS - OBH

- | |
|--|
| <ul style="list-style-type: none">• Directs to attachment 10• N – Attachment 10 only references 2 FTE Recovery Coach Coordinators |
|--|

3. Implementation - Work Plan

- | |
|--|
| <ul style="list-style-type: none">• Directs to attachment 11• Attachment 11 – includes detailed work plan including timeline chart and key program developments |
|--|

Part IV, Section IV. Cost Proposal

- | |
|---|
| <ul style="list-style-type: none">• Cost proposal totals \$636k• Only includes 2 FTE Recovery Coach Coordinators• Fringe at 25% |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: January 30, 2024

EVALUATOR NAME: Lorrie Mitchell, LCSW

EVALUATOR DEPARTMENT: DHHS/OADS

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none">Positive- Long standing history of providing services which includes Peer Supports	
2. Subcontractors	
<ul style="list-style-type: none">Positive, MPG well known for their training in required curriculum.	
3. Organizational Chart	
<ul style="list-style-type: none">Provided	
4. Litigation	
<ul style="list-style-type: none">Many settled cases, and open cases currently.	
5. Financial Viability	
<ul style="list-style-type: none">Submitted	
6. Certificate of Insurance	
<ul style="list-style-type: none">provided	

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: January 30, 2024

EVALUATOR NAME: Lorrie Mitchell, LCSW

EVALUATOR DEPARTMENT: DHHS/OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none"> • Positive- Locations identified
B. Information Technology Requirements
<ul style="list-style-type: none"> • Positive, plans to follow guidelines outlined in RFP • Has operating system in place and plans to comply with requirements set forth in RFP. • Positive, has system in place now • Positive- plans to follow through • Positive- plans to follow guidelines • Positive- has system in place currently • Positive- has system in play currently. • Positive- has plan in place currently • Positive- plans to comply • Positive- plans to follow guidelines set forth in RFP. • Positive- Plans for smooth transition of DATA • Positive- plans to comply
C. Coordination and Collaboration
<ul style="list-style-type: none"> • Positive- attachment provided • Positive- plans to follow requirement • Positive- plans to follow requirements • Positive- plans to follow requirements • Positive- plans to follow requirements
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none"> • Positive- Attachment provided • Positive- plans to meet requirement • Positive-plans to meet requirement • Positive, plans to meet requirement • Postiive- plans to meet requirement
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • Positive- Plan to develop and implement • Positive- Plan to develop and provide ongoing TA
F. Recordkeeping, Data Collection/Management, and Supportive Documentation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: January 30, 2024

EVALUATOR NAME: Lorrie Mitchell, LCSW

EVALUATOR DEPARTMENT: DHHS/OADS

• Positive- plan to meet requirement
• Positive, Plan to develop and utilize
• Positive- Plan to create and maintain
• Positive- Plan to meet requirement
• Positive- plan to meet requirement
• Positive- Plan to create and maintain
• Positive- Plan to submit policies and procedures
G. Staffing Requirements
• Positive-Plan to follow requirements
H. Reports
• Positive- Plan to comply with requirement
• Posivie- Plan to report as required
2. Staffing
• Provided
• Identified in subcontractor section?
• Positive- attachment provided
3. Implementation - Work Plan
• Positive- Provided plan to meet requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 2/1/2024

EVALUATOR NAME: Mindy Smith

EVALUATOR DEPARTMENT: Office of Behavioral Health

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none">• N – no demonstrated experience with recovery coach positions	
2. Subcontractors	
<ul style="list-style-type: none">• I – They will subcontract with an outside organization to train recovery coaches	
3. Organizational Chart	
<ul style="list-style-type: none">• P – Meets requirement• Q - Michael Tausek is listed as the Director of Recovery Services, but he is no longer working there?	
4. Litigation	
<ul style="list-style-type: none">• N – There are currently three open lawsuits.	
5. Financial Viability	
<ul style="list-style-type: none">• P – Meets requirement	
6. Certificate of Insurance	
<ul style="list-style-type: none">• P – Meets requirement	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 2/1/2024

EVALUATOR NAME: Mindy Smith

EVALUATOR DEPARTMENT: Office of Behavioral Health

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility(ies) Standards/Requirements
<ul style="list-style-type: none"> • Q – 1. Was Sweetser awarded any of the Recovery Centers? • Q – 1. If not awarded, what is the other plan for locations to provide coordination support? • P – 2. Meets requirement
B. Information Technology Requirements
<ul style="list-style-type: none"> • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement
C. Coordination and Collaboration
<ul style="list-style-type: none"> • P – Meets requirement • P – Meets requirement • 3-a: P – meets requirement • 3-a: I – Mentions social media platforms as a mechanism for training awareness. I am not aware of a Peer Training Network social media platform. • 3-b: N – No description of process for developing a coordination and referral process • Q – Will they train Recovery Coaches within 30 days? • P – Meets requirement
D. Core Knowledge Training, Supervision, and Workforce Development
<ul style="list-style-type: none"> • P – Meets requirement • P – Meets requirement • P – Meets requirement • P – Meets requirement • Q – Will they have capacity to offer that frequency of training?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202307151

RFP TITLE: Coordination Services: Recovery Coach and Training Services

BIDDER NAME: Sweetser

DATE: 2/1/2024

EVALUATOR NAME: Mindy Smith

EVALUATOR DEPARTMENT: Office of Behavioral Health

<ul style="list-style-type: none"> • P – Meets requirement.
E. Programmatic Quality Assurance and Technical Assistance (TA)
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • 'P – Meets requirement
F. Recordkeeping, Data Collection/Management, and Supportive Documentation
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
G. Staffing Requirements
<ul style="list-style-type: none"> • P – Meets requirement
H. Reports
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
2. Staffing
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • P – Meets requirement
<ul style="list-style-type: none"> • N – Staffing plan does not match the 8a-5p requirement for accessibility as outlines in Part A.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • P – Meets requirement



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202307151**

RFP TITLE: Coordination Services for Recovery Coach and Training Services

I, Michael Freysinger accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

DocuSigned by:

Michael Freysinger

E442AED86607470...

Signature

Jan-16-2024

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202307151**

RFP TITLE: Coordination Services for Recovery Coach and Training Services

I, Anna Ko accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

DocuSigned by:
A handwritten signature in blue ink, appearing to read 'Anna Ko'.

Signature

Jan-12-2024

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202307151**

RFP TITLE: Coordination Services for Recovery Coach and Training Services

I, Melanie Messina accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

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DocuSigned by:

Melanie Messina

2BB4FEA77C674E1...

Signature

Jan-12-2024

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202307151**

RFP TITLE: Coordination Services for Recovery Coach and Training Services

I, Kenney Miller accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

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DocuSigned by:

Kenney Miller

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Signature

Jan-15-2024

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202307151**

RFP TITLE: Coordination Services for Recovery Coach and Training Services

I, Lorrie Mitchell accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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DocuSigned by:

Lorrie Mitchell

62A95A95E88242B...

Signature

Jan-12-2024

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202307151**

RFP TITLE: Coordination Services for Recovery Coach and Training Services

I, Mindy Smith accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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DocuSigned by:

Mindy Smith

2F1B0B88647641E...

Signature

Jan-12-2024

Date