



PROCUREMENT JUSTIFICATION FORM (PJF)

This form must accompany all contract requests and sole source requisitions (RQS) over \$5,000 submitted to the Office of State Procurement Services.

INSTRUCTIONS: Please provide the requested information in the white spaces below. All responses (except signatures) must be typed; no hand-written forms will be accepted. See the guidance document posted with this form on the Procurement Services intranet site (Forms page) for additional instructions.

PART I: OVERVIEW				
Department Office/Division/Program:		Education		
Department Contract Administrator or Grant Coordinator:		Susan Berry		
(If applicable) Department Reference #:				
Amount: (Contract/Amendment/Grant)		\$ 34,640	Advantage CT / RQS #:	CT 05A 20241010*0985
CONTRACT	Proposed Start Date:	1/29/2025	Proposed End Date:	3/31/2025
AMENDMENT	Original Start Date:		Effective Date:	
	Previous End Date:		New End Date:	
GRANT	Project Start Date:		Grant Start Date:	
	Project End Date:		Grant End Date:	
Vendor/Provider/Grantee Name, City, State:		Samorock, LLC (The Samoset Resort) 220 Warrenton St. Rockport, ME 04856		
Brief Description of Goods/Services/Grant:		Wellness Conference venue with lodging, food and meeting space		

PART II: JUSTIFICATION FOR VENDOR SELECTION			
Check the box below for the justification(s) that applies to this request. (Check all that apply.)			
<input type="checkbox"/>	A. Competitive Process	<input type="checkbox"/>	G. Grant
<input type="checkbox"/>	B. Amendment	<input type="checkbox"/>	H. State Statute/Agency Directed
<input checked="" type="checkbox"/>	C. Single Source/Unique Vendor	<input type="checkbox"/>	I. Federal Agency Directed
<input type="checkbox"/>	D. Proprietary/Copyright/Patents	<input type="checkbox"/>	J. Willing and Qualified
<input type="checkbox"/>	E. Emergency	<input type="checkbox"/>	K. Client Choice
<input type="checkbox"/>	F. University Cooperative Project	<input type="checkbox"/>	L. Other Authorization

Please respond to ALL of the questions in the following sections.

PART III: SUPPLEMENTAL INFORMATION

1. Provide a more detailed description and explain the need for the goods, services or grant to supplement the response in Part I.

The Maine School Winter Wellness Summit (The Summit) is a professional learning opportunity designed to support school employees and student wellness as well as a healthy and positive learning environment for all. The Summit is a component of the Maine Schoolsite Wellness Program within the Maine DOE Office of School and Student Supports. The program focuses on improving the overall health and well-being of school staff, positively influencing the health of students, and creating a healthier school and learning environment. This is done by addressing aspects of physical, mental, emotional, social, and occupational health. Schools send teams or individuals to The Summit where they are immersed in a positive, health-promoting experience that models strategies and practices that can be replicated and implemented in local school communities. Attendees gather knowledge, resources, tools, and strategies through these experiences that promote and enhance the health and well-being of staff, students, families, and the school environment. The professional learning includes how to establish staff and/or student health promotion and wellness teams and develop action plans for their schools and/or districts with the intent of making health and wellness an integral part of the school community. Research shows that healthier staff and students and a positive, health-enhancing school environment improves attendance (both staff and students), staff retention, and supports academic success. This work is more important than ever as schools are faced with increased demands and challenges including post-pandemic problems, increased mental health issues for youth and adults, staffing shortages, and socio-economic needs.

The Summit is scheduled for mid-winter at the request of the attendees, citing it is a time in the school year when administrators and school personnel need a positive, emotional boost. To be the most impactful, this event requires a space that is warm and inviting, comfortable, health promoting, and makes participants feel valued and appreciated... not a classroom-style setting. The setting is key to meeting the outcomes of this wellness Summit. The Samoset is one of a limited number of venues that are open in January, and the only one known to offer the space needed for large group sessions as well as multiple breakout spaces for a wide variety of engaging workshops and wellness experiences, and at an affordable cost. The facility has a large indoor health and fitness facility and outdoor activity spaces that expand the health promoting offerings. Onsite lodging is available to participants if they choose. The Samoset strives to offer room rates at or near the government per diem rate as it is off season. It is important to the schools and individuals attending to be able to stay at the event location. If the event has to be canceled due to inclement weather, the venue is willing to reschedule at the earliest available dates at no additional charge, before March 31, 2025.

2. Provide a brief justification for the selected vendor to supplement the response in Part II. Reference the RFP number, if applicable.

The Schoolsite Wellness Program strives to create a Winter Wellness Summit with an environment conducive to health promotion, wellness and learning. It is designed to model indoor and outdoor experiences that support and promote health and well-being and provide valuable information, resources and workshop experiences. To host the Winter Wellness Summit, we require a variety of

PART III: SUPPLEMENTAL INFORMATION

physical spaces including a large enough room for general/plenary sessions with movement, a minimum of seven additional spacious breakout session rooms with ample room to move around and engage, indoor and outdoor areas to engage in wellness experiences throughout the day such as a pool, trails, quiet spaces, group activities, etc., and a dining area that can serve the participants. The facility needs to provide healthier food options at or near the State per diem costs. The Samoset is willing to work with the event coordinator to design meals that are healthier, appealing and that meet participant dietary needs within the State per diem. They will hold pricing this year from past events (when other conferences are having to pay more for the facility use), and they will allow us to utilize the entire property while waiving the \$40 resort fee for attendees. The Samoset has audio-visual services available onsite to ensure strong wi-fi and that quality equipment are available. Reliable AVS is a must for the plenary and breakout sessions to be successful experiences. There are very limited facilities in Maine, especially in the mid-coast region, that can offer the total package of services at or near the state rate and accommodate our number of attendees, from 150 to potentially 250, in the winter. (The numbers are projected based on past attendance and growth). The venues on the pre-qualified vendor list are either not available due to the season (Sugarloaf and Sunday River); they do not meet the environmental and emotional needs being sought (Augusta Civic Center and University of Maine); and/or they cannot accommodate our specific needs for indoor and outdoor spaces and health and fitness facilities. The mid-coast area is more centrally located when we consider the State geography and more conducive to winter travel than the mountains. Participants from past events have shared that they find the coastal location a positive, inviting, and relaxing environment. There are no other venues in the chosen area for The Summit that would meet the needs of space, environment for this health promoting and learning event, work with state per diem rates, and are open in the winter. The Samoset facility can accommodate the number of attendees, has the breakout rooms, provides a healthier, safer meeting space that allows attendees to be spread out and be comfortable. Other venues, including the Armory system, have been researched for The Summit. The Armory does not have a facility in the chosen location, nor do they have facilities that provide the space, a healthy environment, and technology needed anywhere in the State. Other potential venues that were explored are either closed in the winter, cannot accommodate the number of attendees or session spaces, and/or the setting did not meet the physical/emotional/health-promoting criteria. Attendees have voiced the importance of the location and environment to meeting the outcomes of this event.

3. Explain how the negotiated costs or rates are fair and reasonable; or how the funding was allocated to grantee.

This event is being held during The Samoset Resort's off-season, so they are able to offer the use of their conference meeting spaces and general spaces at a lower and affordable rate. They are willing to hold the facility cost at the 2024 rate. The facility works very hard to stay within the State per diem rates for food while preparing healthy and appealing food options outside of their standard meal options. The GSA rate for meals increased this year, therefore, we will be able to hold food costs. The Samoset is more than willing to work with the State to bring the cost within GSA per diem rates without losing money. The GSA lodging rate went up in 2024 from \$127 to \$164 and the facility graciously made rooms available well below the increased per diem lodging rate. Unexpectedly, in 2025, the per diem lodging rates dropped significantly to \$128 so it may be necessary to seek a waiver for the rooms being paid for with State funds. The Samoset will hold the 2024 rates of \$139 or \$159 for attendees which is important to attendance. The lodging costs are outside of the contract but impact the planners and attendees. As a wellness bonus, The Samoset extends the reduced lodging rate to attendees for the following weekend if they choose to stay on

PART III: SUPPLEMENTAL INFORMATION

their own. Rooms are the financial responsibility of the attendees. Most of the facility will be available to our attendees allowing for increased engagement and experiences. There is not an additional cost for outdoor spaces and the \$40/guest resort fee that includes the fitness facilities is being waived. As stated earlier, as a health promoting and wellness event, the environment, healthier food options and comfortable accommodations are key to our success and to meeting the intentions and outcomes of The Summit.

To hold this event, state level Title IV funds from the Elementary and Secondary Education Act (ESEA) program are also being sought. In addition, participants will be charged a very reasonable registration fee to cover the cost of food, materials, and some presenter fees. Scholarships will be made available if we receive the Title IV funds to help offset the travel, lodging and substitute fees for those in need.

4. Describe the plan for future competition for the goods or services.

The Wellness Program coordinator will analyze the past Summit location data and reflect on the needs for the 2026 Winter Wellness Summit in preparation of putting together a Request for Proposal. We will draft the RFP in the first two weeks of March 2025, with the intent to have it posted in early April and proposals due before the first of May. Proposal evaluations can then be completed and the award posted by mid-May. The goal is to secure an awardee by mid-June and begin the contract process. This timeline would allow for additional processing time should there be an appeal. The hope is to have a contract in place to begin planning July 15, 2025. We will monitor the Pre-Qualified Vendors for Meetings and/or Conferences List for potential sites as well. If we feel there are potential sites, we will request bids.

PART IV: AMERICAN RESCUE PLAN ACT (ARPA) / MAINE JOBS & RECOVERY PLAN (MJRP)

Does this request utilize ARPA/MJRP funds?

Yes, MJRP funds (023) – If Yes, please attach the approved Business Case(s).

Yes, ARPA funds (025) – If Yes, please be aware of the requirements from awarding federal agencies.

No – If No, proceed to Part V.

PART V: CONFLICTS OF INTEREST (COI); CONTRACT WITH THE STATE

Maine law contains Conflict of Interest statutes directed to State Departments, State Officers, and Employees Generally under MRS [Title 5, §18](#) and [§18-A](#), in harmony with MRS [Title 17, §3104](#).


The requesting department signatory understands and acknowledges Maine’s Conflict of Interest statutes.

PART VI: APPROVALS

The signatures below indicate approval of this procurement request.

Signature of requesting
Department’s Commissioner
(or designee):

Megan Welter

Typed Name:	Megan welter	Date:	12/5/2024
Signature of DAFS Procurement Official:			
Typed Name:	Kathy Paquette	Date:	12/9/2024

Certificate Of Completion

Envelope Id: 3A4DB39C0A114626919DBF6119969E30
 Subject: Please Docusign This Document
 Source Envelope:
 Document Pages: 5
 Certificate Pages: 4
 AutoNav: Enabled
 Envelopeld Stamping: Disabled
 Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Status: Completed
 Envelope Originator:
 Megan Welter
 megan.welter@maine.gov
 IP Address: 64.207.219.136

Record Tracking

Status: Original 12/5/2024 11:11:20 AM	Holder: Megan Welter megan.welter@maine.gov	Location: DocuSign
Security Appliance Status: Connected	Pool: StateLocal	
Storage Appliance Status: Connected	Pool: Maine Department of Education	Location: DocuSign

Signer Events

Megan Welter
 megan.welter@maine.gov
 Associate Commissioner of Public Education
 Security Level: Email, Account Authentication (None)

Signature

Megan Welter
 Signature Adoption: Pre-selected Style
 Using IP Address: 98.2.196.75

Timestamp

Sent: 12/5/2024 11:11:21 AM
 Viewed: 12/5/2024 11:24:49 AM
 Signed: 12/5/2024 11:25:29 AM
 Freeform Signing

Electronic Record and Signature Disclosure:
 Accepted: 2/22/2022 8:43:12 AM
 ID: a3f5e052-e68a-4555-b08f-3ab2586f161c

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	12/5/2024 11:11:21 AM
Certified Delivered	Security Checked	12/5/2024 11:24:49 AM
Signing Complete	Security Checked	12/5/2024 11:25:29 AM
Completed	Security Checked	12/5/2024 11:25:29 AM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

From time to time, Carahsoft OBO Maine Department of Education (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

Getting paper copies

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact Carahsoft OBO Maine Department of Education:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: jennifer.l.tarr@maine.gov

To advise Carahsoft OBO Maine Department of Education of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at jennifer.l.tarr@maine.gov and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

If you created a DocuSign account, you may update it with your new email address through your account preferences.

To request paper copies from Carahsoft OBO Maine Department of Education

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to jennifer.l.tarr@maine.gov and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

To withdraw your consent with Carahsoft OBO Maine Department of Education

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an email to jennifer.l.tarr@maine.gov and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

Required hardware and software

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <https://support.docusign.com/guides/signer-guide-signing-system-requirements>.

Acknowledging your access and consent to receive and sign documents electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to ‘I agree to use electronic records and signatures’ before clicking ‘CONTINUE’ within the DocuSign system.

By selecting the check-box next to ‘I agree to use electronic records and signatures’, you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify Carahsoft OBO Maine Department of Education as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by Carahsoft OBO Maine Department of Education during the course of your relationship with Carahsoft OBO Maine Department of Education.