

**State of Maine**  
**Master Score Sheet**

RFP# 202503044					
Research and Reporting on Aging and Disability Services					
<b>Bidder Name:</b>		<b>Altarum Institute</b>	<b>Arkansas Foundation for Medical Care, Inc</b>	<b>Datagain Inc.</b>	<b>Delineate, LLC</b>
<b>Proposed Cost:</b>		<b>\$1,587,462.11</b>	<b>\$1,284,947.33</b>	<b>\$696,750.00</b>	<b>\$1,488,250.08</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	Pass/Fail	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	30.00	24.00	21.00	13.00	22.00
Section III: Proposed Services	35.00	25.00	22.00	20.00	30.00
Section IV: Cost Proposal	35.00	15.36	18.98	35.00	16.93
<b>TOTAL</b>	<b><u>100.00</u></b>	<b><u>64.36</u></b>	<b><u>61.98</u></b>	<b><u>68.00</u></b>	<b><u>68.39</u></b>
<b>Bidder Name:</b>		<b>Guidehouse Inc</b>	<b>Halperin Health Policy Solutions</b>	<b>HSRI</b>	<b>LW Consulting Inc.</b>
<b>Proposed Cost:</b>		<b>\$1,289,272.19</b>	<b>\$1,230,000.00</b>	<b>\$1,281,000.00</b>	<b>\$1,320,697.93</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	Pass/Fail	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	30.00	15.00	22.00	25.00	16.00
Section III: Proposed Services	35.00	26.00	25.00	19.00	11.00
Section IV: Cost Proposal	35.00	18.91	19.83	19.04	18.46
<b>TOTAL</b>	<b><u>100.00</u></b>	<b><u>59.91</u></b>	<b><u>66.83</u></b>	<b><u>63.04</u></b>	<b><u>45.46</u></b>

<b>Bidder Name:</b>		<b>National Opinion Research Center DBA NORC</b>	<b>New Editions Consulting</b>	<b>Nyaa Scientific Research Services DBA Nyaa Health</b>	<b>Public Consulting Group LLC</b>
<b>Proposed Cost:</b>		<b>\$1,099,809.86</b>	<b>\$994,219.15</b>	<b>\$963,615.02</b>	<b>\$1,364,445.42</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	Pass/Fail	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	30.00	25.00	26.00	19.00	16.00
Section III: Proposed Services	35.00	30.00	23.00	22.00	20.00
Section IV: Cost Proposal	35.00	22.17	24.53	25.31	17.87
<b>TOTAL</b>	<b><u>100.00</u></b>	<b><u>77.17</u></b>	<b><u>73.53</u></b>	<b><u>66.31</u></b>	<b><u>53.87</u></b>
<b>Bidder Name:</b>		<b>The Urban Institute</b>	<b>Tury Research Institute</b>	<b>University of Southern Maine</b>	
<b>Proposed Cost:</b>		<b>\$2,058,469.00</b>	<b>\$2,588,400.00</b>	<b>\$783,880.00</b>	
<b>7Scoring Sections</b>					
Section I: Preliminary Information	N/A	N/A	N/A	N/A	
Section II: Organization Qualifications and Experience	30.00	16.00	9.00	27.00	
Section III: Proposed Services	35.00	24.00	5.00	32.00	
Section IV: Cost Proposal	35.00	11.85	9.42	31.11	
<b>TOTAL</b>	<b><u>100.00</u></b>	<b><u>51.85</u></b>	<b><u>23.42</u></b>	<b><u>90.11</u></b>	



**Award Justification Statement**  
**RFP# 202503044**  
**Research and Reporting on Aging and Disability Services**

**I. Summary**

Through RFP# 202503044, the Department sought proposals for the Research and Reporting on Aging and Disability Services. Fifteen (15) Bidders responded to the RFP:

- Altarum Institute
- Arkansas Foundation for Medical Care, Inc.
- Datagain Inc.
- Delineate, LLC
- Guidehouse Inc.
- Halperin Health Policy Solutions
- Human Services Research Institute
- LW Consulting Inc.
- New Editions Consulting, Inc.
- National Opinion Research Center dba NORC
- Nyaa Scientific Research Services – Nyaa Health
- Public Consulting Group LLC
- Tury Research Institute
- The Urban Institute
- University of Maine System acting through University of Southern Maine

Through the evaluation process, University of Maine System acting through University of Southern Maine (USM) received the highest score and was determined to provide the best value to the State of Maine.

**II. Evaluation Process**

An Evaluation Team, composed of five (5) State employees, applied the consensus method in scoring the Bidders' Qualifications & Experience and Proposed Services. Scores for the Cost Proposals were assigned using a mathematical formula.

**III. Qualifications & Experience**

USM offered an accomplished, experienced-laden portfolio demonstrating the ability to deliver the services required by the RFP and successfully perform under the prospective contract.

**IV. Proposed Services**

USM provided a well-rounded response outlining an understanding of, and ability to meet, programmatic requirements of the RFP. Additionally, USM demonstrated the

means and skills necessary to meet the RFP's performance requirements through its project teams' competencies, subject matter expertise, and background.

**V. Cost Proposal**

USM provided a competitive cost of \$783,880.00.

**VI. Conclusion**

Out of 100 possible points, the Evaluation Team awarded USM a score of 90.11. The strength of USM's proposal outweighed the other Bidders through its qualifications and experience and the services and cost it proposed. The Evaluation Team determined that the proposal submitted by University of Maine System acting through University of Southern Maine represents the best value to the State of Maine.

Janet T. Mills  
Governor

Sara Gagné-Holmes  
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)

Jul-01-2025

Via Electronic Mail: frank.mckenna@altarum.org

Altarum Institute  
Frank McKenna  
26200 Town Center Drive  
Suite 350  
Novi, Michigan 48375

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Mr. McKenna,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

- University of Maine System acting through University of Southern Maine-USM.

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder 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 the apparent successful vendor. The vendor 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).

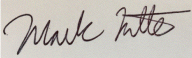
This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract.

Any person aggrieved by an 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, Office of State Procurement Services [formerly the Division of Purchases], Chapter 120, § (2) (2).

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

Sincerely,

Signed by:

A handwritten signature in black ink, appearing to read "Mark Lutte", is written over a light gray rectangular background.

C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:

A handwritten signature in blue ink, appearing to read "Jim Lopatosky", is written over a light gray rectangular background.

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Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
Commissioner



Maine Department of Health and Human Services  
Division of Contract Management  
11 State House Station  
109 Capitol Street  
Augusta, Maine 04333-0011  
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TTY: Dial 711 (Maine Relay)

Jul-01-2025

Via Electronic Mail: [SBD@afmc.org](mailto:SBD@afmc.org)

Arkansas Foundation for Medical Care, Inc  
Debbie Rushing  
1020 West 4th Street, Suite 400  
Little Rock, AR 72201

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Rushing,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder.

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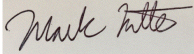
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:  
  
C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:  
  
66738ED17E0C4B2...  
Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services



Janet T. Mills  
Governor

Sara Gagné-Holmes  
Commissioner



Maine Department of Health and Human Services  
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Jul-01-2025

Via Electronic Mail: [rishi@datagainservices.com](mailto:rishi@datagainservices.com)

Datagain Inc.  
Rishi Darira  
10750 Moore Drive  
Parkland Florida, 33076

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Mr. Darira,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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

Sincerely,

Signed by:  
  
C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:  
  
66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

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Jul-01-2025

Via Electronic Mail: [tim@delineateconsulting.com](mailto:tim@delineateconsulting.com)

Delineate, LLC  
Timothy McFarlane  
Allison Point Trail Suite 130  
Indianapolis, IN 46250 8275

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Mr. McFarlane,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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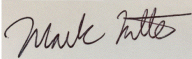
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:

A handwritten signature in black ink, appearing to read "Mark Lutte", is enclosed within a grey rectangular box.

C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:

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Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
Commissioner



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

Jul-01-2025

Via Electronic Mail: [lrobertson@guidhouse.com](mailto:lrobertson@guidhouse.com)

Guidehouse Inc  
Lance Robertson  
1676 International Drive, Suite 800  
McLean, Virginia 22102

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Mr. Robertson,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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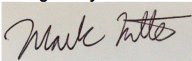
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:



C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:



66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
Commissioner



Maine Department of Health and Human Services  
Division of Contract Management  
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Augusta, Maine 04333-0011  
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TTY: Dial 711 (Maine Relay)

Jul-01-2025

Via Electronic Mail: [ahalperin@halperinhealthpolicysolutions.com](mailto:ahalperin@halperinhealthpolicysolutions.com)

Halperin Health Policy Solutions  
Alissa Halperin  
140 West Blade Drive  
Furnace, PA 16865

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Halperin,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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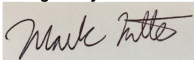
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Thank you for your interest in doing business with the State of Maine.

Sincerely,


Signed by:



C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:



66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services



Janet T. Mills  
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TTY: Dial 711 (Maine Relay)

Jul-01-2025

Via Electronic Mail: [dhughes@hsri.org](mailto:dhughes@hsri.org)

Human Services Research Institute - HSRI  
David Hughes  
2336 Massachusetts Avenue  
Cambridge, MA 02140

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Mr. Hughes,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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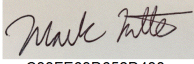
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:

A blue ink signature of Mark Lutte is visible within a grey rectangular box.

C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:

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66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

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Maine Department of Health and Human Services  
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Jul-01-2025

Via Electronic Mail: [NOliver@LW-Consult.com](mailto:NOliver@LW-Consult.com)

LW Consulting Inc  
Nicole Oliver  
5925 Stevenson Avenue, Suite G  
Harrisburg, PA 17112

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Oliver,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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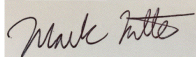
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Department of Administrative and Financial Services, Bureau of General Services, Office of State Procurement Services [formerly the Division of Purchases], Chapter 120, § (2) (2).

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

Sincerely,

Signed by:



C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:



66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
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)

Jul-01-2025

Via Electronic Mail: [Taylor-Kathleen@norc.org](mailto:Taylor-Kathleen@norc.org)

National Opinion Research Center, dba NORC  
Kathleen Taylor  
55 East Monroe Street, 30th Floor  
Chicago, IL 60603

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Taylor

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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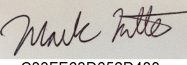
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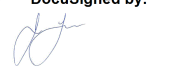
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:  
  
C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:  
  
66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
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)

Jul-01-2025

Via Electronic Mail: [tturner@neweditions.net](mailto:tturner@neweditions.net)

New Editions Consulting  
Tracy Turner  
103 W. Broad St., Suite 400  
Falls Church, VA 22046

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Turner,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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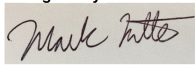
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:  
  
C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:  
  
66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services



Janet T. Mills  
Governor

Sara Gagné-Holmes  
Commissioner



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

Jul-01-2025

Via Electronic Mail: [icheruve@nyaahealth.org](mailto:icheruve@nyaahealth.org)

Nyaa Scientific Research Services - Nyaa Health  
Jubin J. Cheruvelil  
3003 E. Michigan Ave. #1015  
Lansing, MI 48912

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Mr. Cheruvelil,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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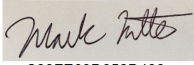
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:  
  
C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:  
  
66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
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)

Jul-01-2025

Via Electronic Mail: [btrujillo@pcgus.com](mailto:btrujillo@pcgus.com)

Public Consulting Group LLC  
Brittani Trujillo  
148 State Street, 10th Floor  
Boston, MA 02109

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Trujillo,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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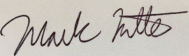
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Thank you for your interest in doing business with the State of Maine.

Sincerely,


Signed by:



C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:



66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
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)

Jul-01-2025

Via Electronic Mail: [rjohnson@urban.org](mailto:rjohnson@urban.org)

The Urban Institute  
Richard Johnson  
500 L'Enfant Plaza SW  
Washington, DC 20024

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Mr. Johnson,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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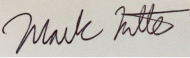
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Sincerely,

Signed by:  
  
C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:  
  
66738ED17E0C482...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

Janet T. Mills  
Governor

Sara Gagné-Holmes  
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)

Jul-01-2025

Via Electronic Mail: [kalesan@turyresearch.com](mailto:kalesan@turyresearch.com)

Tury Research Institute  
Bindu Kalesan  
1022 Plummer Circle  
Manning, SC 29102

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Kalesan,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:  
  
66738ED17E0C4B2

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services



Janet T. Mills  
Governor

Sara Gagné-Holmes  
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)

Jul-01-2025

Via Electronic Mail: [kimberly.i.snow@maine.edu](mailto:kimberly.i.snow@maine.edu)

University of Southern Maine  
Kimberly Snow  
34 Bedford Street  
Wishcamper Center  
Portland ME, 04104

SUBJECT: Notice of Conditional Contract Award under RFP 202503044

Dear Ms. Snow,

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 Aging and Disability Services for Researching and Reporting on Aging and Disability Services. 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 the following bidder:

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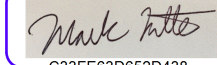
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:

A handwritten signature in black ink, appearing to read "Mark Lutte", is enclosed within a grey rectangular box.

C33FE63D652D438...

Mark Lutte,  
Chief Operating Officer  
Office for Aging and Disability Services

DocuSigned by:

A handwritten signature in blue ink, appearing to read "Jim Lopatosky", is enclosed within a blue rectangular box.

66738ED17E0C4B2...

Jim Lopatosky  
Director of Contract Management  
Department of Health and Human Services

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Altarum Institute

**DATE:** July 1, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

---

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>24.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>25.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>15.36</b>
<u><b>Total Points</b></u>	<u><b>100.00</b></u>	<u><b>64.36</b></u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Altarum Institute

**DATE:** July 1, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Altarum Institute

**DATE:** July 1, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>24.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Based in Novi, Michigan, with Maine-based team members</li><li>• Not-for-profit organization</li><li>• Cites 20+ years of history working for the State</li><li>• Cites experience working with 40+ states</li><li>• Established Altarum Medicare-Medicaid Services for States (AMMS) and Palladian Partners, Inc. as subsidiaries</li><li>• Cites expertise in aging and disability, research, analytic and reporting capabilities, programmatic and operational knowledge, hands-on expertise, and communications experience</li><li>• Provided three projects –<ul style="list-style-type: none"><li>➤ Two of three projects relevant to RFP, with one involving a recent project for Department with an RFP-related population (dually eligible individuals)</li><li>➤ Third project for Connecticut Office of Health Strategy focused on a series of state research reports, though not clear how these reports are directly related to LTSS</li></ul></li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Names two subsidiaries as subcontractors</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Provided, did not indicate subcontractors</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• Indicated one item, not related to project performance</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Provided for CY 2021-23</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided, not indicating professional liability</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Altarum Institute

**DATE:** July 1, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>25.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Proposed a methodology of coordination across project management workstreams (specific to engagement, analytics, reports, and communication functions)</li> <li>Proposed assigning a task lead for each workstream</li> <li>Proposed a project management approach addressing seven related areas</li> <li>Described detailed stages and processes for obtaining primary and secondary data sources</li> <li>Proposed use of Bidder's proprietary web survey platform - Altarum Secure Cloud Network (ASCN), detailing how it intends to collect primary and secondary data, including a chart of data sources</li> <li>Proposed a methodology to analyze the data</li> </ul>
<ul style="list-style-type: none"> <li>Proposed a well-explained stakeholder engagement approach, offering opportunities for interested parties to provide feedback on report contents</li> <li>Offered a visual illustrating its engagement process</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>Offered in-depth explanation of Long-Term Services and Supports reports development, identifying potential data sources relevant to report comparison and analysis</li> <li>Proposed a detailed report framework, recognizing statutory requirements for data, required information to be included, and suggested data presentation</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Altarum Institute

**DATE:** July 1, 2025

<ul style="list-style-type: none"><li>• Proposed, and offered examples of, high-quality infographics</li></ul>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<ul style="list-style-type: none"><li>• Proposed oversight of subcontractors by president/CEO, with project manager engagement</li></ul>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Altarum Institute

**DATE:** July 1, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>15.36</b>

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,587,462.11</b>	x	<b>35 points</b>	=	<b>15.36</b>

**Evaluation Team Comments:**

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Arkansas Foundation for Medical Care, Inc.

**DATE:** May 16 & 27, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>21.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>22.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>18.98</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>61.98</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Arkansas Foundation for Medical Care, Inc.

**DATE:** May 16 & 27, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Arkansas Foundation for Medical Care, Inc.

**DATE:** May 16 & 27, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>21.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• 50 years of experience related to data and assessment and in supporting multiple state governments and agencies, e.g., departments of justice, health resources and services administrations, substance abuse and mental health service administrations</li><li>• Knowledge and experience with collecting health data, including Medicare and Medicaid</li><li>• Serves as a key partner in Medicare and Medicaid</li><li>• One of 14 subcontractors supporting quality improvement networks or quality improvement organizations within the Centers for Medicare &amp; Medicaid Services program</li><li>• Is certified with Healthcare Effectiveness Data And Information Set (HEDIS), HEDIS Measures, Accredited Health Utilization Management, and Certified Contact Center</li><li>• Provided three projects, demonstrating expertise in collecting, analyzing, and reporting data for program evaluation and informing outcomes</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• None</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Indicated one case, not related to performance under contract</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Provided independent auditor report for 2022-2024, with no findings/concerns noted</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Provided, not indicating professional liability</li></ul>	

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Arkansas Foundation for Medical Care, Inc.

**DATE:** May 16 & 27, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>22.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Proposed use of Research Electronic Data Capture (REDCap) software</li> <li>Did not offer specific description of a plan to use Department-provided data</li> <li>Proposed facilitating Department-approved stakeholder engagement using MS teams or Department-provided virtual platform</li> <li>Proposed developing and maintaining a stakeholder engagement plan and providing engagement materials in advance of meetings</li> <li>Proposed conducting an annual site visit</li> <li>Did not offer a supporting reference for its capability/expertise in the application of Plain Language</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Proposed facilitating stakeholder meetings only in contract year one</li> <li>Offered a robust description of how it intends to provide graphic presentation of report findings, incorporating a variety of visual display suggestions in a data visualization outline</li> <li>Provided a comprehensive description of its internal controls that ensure no reports or findings are disseminated by staff</li> <li>Proposed using a curated calendar to track the schedules of public data updates</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Manager, Outreach Services is listed as the LTSS Subject Matter Expert, but job description does not include specific minimum education or experience in LTSS</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Arkansas Foundation for Medical Care, Inc.

**DATE:** May 16 & 27, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>18.98</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,284,947.33</b>	x	<b>35 points</b>	=	<b>18.98</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Datagain Inc.

**DATE:** May 27 & 29, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>13.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>20.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>35.00</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>68.00</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Datagain Inc.

**DATE:** May 27 & 29, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Datagain Inc.

**DATE:** May 27 & 29, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>13.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Did not provide information about the organization's qualifications or its background</li><li>• Has experience working with federal and state agencies on work related to social services, health care, and adult protective services</li><li>• Provided three projects, each having limited relevance to the RFP</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• None</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Provided a list of project team positions, not in chart format nor indicating to whom the team reports</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None indicated</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Provided financials for CY 2021-23</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided, not indicating professional liability</li></ul>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Datagain Inc.

**DATE:** May 27 & 29, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>20.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Proposed methodology that includes appropriate data elements to specific reports</li> <li>Proposed developing a protocol to collect and analyze data</li> <li>Proposed in-person stakeholder events</li> <li>Proposed monthly, virtual meetings</li> <li>Proposed ad hoc meetings, emails, and phone calls</li> <li>Proposed appendices, glossaries, formatting, graphic design, etc. to enhance Section 508 compliance</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Completing tasks scheduled in first three months of report development work plan appears unrealistic</li> <li>Proposed feedback loops with Department, incorporating input for production of final report</li> <li>Proposed a multi-stage approach in submitting final reports: Drafts submissions, Department feedback, editing, resubmission</li> <li>Offered minimal response to ensuring no reports or findings are disseminated by any of the Bidder's staff, proposing only staff NDAs and confidentiality agreements</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Proposed a minimum educational requirement, at the bachelor's level, for the survey development and report writing role. This level of expertise generally requires an advanced graduate degree</li> <li>Did not provide time allocations in staffing plan</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Did not provide a timeline chart or indicate project team members responsible for tasks, lumping major tasks, with minimal descriptions, into quarterly timeframes</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Datagain Inc.

**DATE:** May 27 & 29, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>35.00</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$696,750.00</b>	<b>x</b>	<b>35 points</b>	<b>=</b>	<b>35.00</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Delineate, LLC

**DATE:** May 29, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>22.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>30.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>16.39</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>68.39</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Delineate, LLC

**DATE:** May 29, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Delineate, LLC

**DATE:** May 29, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>22.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Ten+ years of public health experience, including with federal and state agencies</li><li>• History with data-related projects, research, reporting, and outreach</li><li>• Offers evidence-based services/products</li><li>• Leadership team is well-versed in aging and long-term services and supports federal block grants and data science</li><li>• Provided three projects, two directly related to the RFP and one reflecting experience in data collection and reporting</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• None</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• None indicated</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Provided, indicating cyber liability but not indicating professional liability</li></ul>	

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Delineate, LLC

**DATE:** May 29, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>30.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>• Offered a comprehensive framework, strategy, and explanation of its program to coordinate and conduct research, data analysis, and reporting</li><li>• Proposed a well-defined, detailed methodology for collaborating with Department and other stakeholders</li><li>• To clearly reflect context and findings in Plain Language, proposed peer reviews, audience-specific language, and Flesch-Kincaid readability software</li><li>• Proposed use of Databricks platform to maintain confidentiality of project data</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>• Proposed use of valuable data sources, e.g., MDS 3.0, for compiling LTSS related-reports</li><li>• Proposed a comprehensive approach to collecting Developmental Disability and Brain Injury information from multiple data sources to meet legislative reporting requirements</li><li>• Proposed a robust methodology for completing a comparative analysis of Adult Protective Services data</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>• Proposed a comprehensive process (tailored to subject group) for collecting data from both Department and other stakeholders</li><li>• Proposed written request to Department to obtain datasets</li><li>• Proposed its five-step process for draft development, feedback, and submission of final reports</li><li>• Proposed a plan to ensure no reports or findings are disseminated by staff through a comprehensive training program in data storage and use</li><li>• Proposed ongoing data monitoring within federal, non-governmental organization, and other sources to ensure up-to-date data and reports</li></ul>
<b>2. Staffing</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Delineate, LLC

**DATE:** May 29, 2025

- |   |
|---|
| <ul style="list-style-type: none"><li>• Proposed job descriptions reflect a balance of Long-Term Services and Supports subject matter experts, data analytics, and research/evaluation</li><li>• Did not provide time allocations</li></ul> |
|---|

<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Delineate, LLC

**DATE:** May 29, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>16.39</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,488,250.08</b>	x	<b>35 points</b>	=	<b>16.39</b>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Guidehouse Inc.

**DATE:** May 30, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>15.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>26.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>18.91</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>59.91</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Guidehouse Inc.

**DATE:** May 30, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Guidehouse Inc.

**DATE:** May 30, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>15.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Worldwide experience in public (federal/state) and private sectors</li><li>Headquartered in Virginia</li><li>Clients include 300 health systems and 38 pharmaceutical companies</li><li>Primary areas of work include data/analytics</li><li>Experience with ageing and disability services, including a prior contract with the Department (OADS)</li><li>Previous corrective action with the Department</li><li>Provided three projects, all relevant to the RFP</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>None</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>None indicated</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Met requirement</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided, indicating professional liability</li></ul>	

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Guidehouse Inc.

**DATE:** May 30, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>26.00</b>

**Evaluation Team Comments:** Response reflected a lack of attention to detail in that it did not align with RFP required format

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>Proposed a well-defined data capture/tracking plan</li><li>Did not provide details in how confidentiality would be maintained, i.e., data safeguards</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>Offered a comprehensive plan to prepare Long-Term Services and Supports (LTSS) reports, which included incorporating data from the State Plan on Aging, relative to the Older Americans Act</li><li>Proposed a process for balancing data sources related to LTSS reporting</li><li>Proposed use of multi-voting process in identifying objectives, goals, and strategies for Adult Protective Services reporting process</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>Proposed leveraging a trademarked data warehouse for sourcing publicly available data</li><li>Proposed periodic review of trademarked data warehouse to update reports</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>Met requirement</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>Met requirement</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Guidehouse Inc.

**DATE:** May 30, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>18.91</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,289,272.19</b>	x	<b>35 points</b>	=	<b>18.91</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Halperin Health Policy Solutions

**DATE:** May 30, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>22.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>25.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>19.83</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>66.83</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Halperin Health Policy Solutions

**DATE:** May 30, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Halperin Health Policy Solutions

**DATE:** May 30, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>22.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Based in Pennsylvania</li><li>• National experience in area of long term services and supports, primarily with Medicaid Home and Community Based Services (waiver programs)</li><li>• Currently serves as subcontractor of Alvarez &amp; Marsal's agreement with Department (OADS) related to the Home and Community Based Services (MaineCare waiver) access rule</li><li>• Experience in nursing facility and residential settings; Medicaid eligibility and enrollment, including those dually eligible for Medicaid and Medicare; and aging and disability programs, including adult protective and guardianship services</li><li>• Provided three projects, all relevant to RFP and citing related research and report development for both Intellectual Developmental Disability and Older Adults, which included work for two national organizations</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Two subcontractors</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None indicated</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided, indicating professional liability</li></ul>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Halperin Health Policy Solutions

**DATE:** May 30, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>25.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Offered a robust plan for research design, data collection/analysis, and reporting using a customized Utilization-Focused Evaluation process</li> <li>Proposed use of universal design principles, for report/visual display development, and WAVE Web Accessibility Evaluation Tools</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>For each Long-Term Services and Supports (LTSS) report, proposed customized schedules, planning steps, and content</li> <li>Proposed a detailed outline for each LTSS report</li> <li>Proposed a Developmental Disability and Brain Injury legislative compliance methodology with customized schedules, planning steps, and content responsive to requirements of 34-B M.R.S.A.</li> <li>Proposed a well-defined outline for each legislative report</li> <li>Proposed a process for summarizing and analyzing Adult Protective Services (APS) data using resources from the APS Technical Assistance Resource Center, e.g., Federal vs. State Comparison, APS Final Rule Worksheet</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Proposed project manager to provide oversight and management of subcontractors</li> <li>Offered a detailed description of expectations of subcontractors with respect to roles/responsibilities, project oversight, communication and monitoring, and overall compliance with the Department's expectations</li> <li>Based on subject matter experience, level of effort directed toward data analysis appears less than what the project scope requires</li> </ul>
<b>3. Implementation - Work Plan</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Halperin Health Policy Solutions

**DATE:** May 30, 2025

- |   |
|---|
| <ul style="list-style-type: none"><li>• Met requirement</li></ul> |
|---|

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Halperin Health Policy Solutions

**DATE:** May 30, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>19.83</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,230,000.00</b>	x	<b>35 points</b>	=	<b>19.83</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Human Services Research Institute

**DATE:** June 3, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>25.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>19.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>19.04</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>63.04</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Human Services Research Institute

**DATE:** June 3, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Human Services Research Institute

**DATE:** June 3, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>25.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Based in Cambridge, MA</li><li>• Not-for-profit organization, in business for nearly 50 years</li><li>• Experience with government (federal, state, local) agencies; involved across a span of human services topics, including the population served by OADS</li><li>• Experience with performing services for Department and is currently working with OADS to implement a needs assessment tool for individuals utilizing home and community-based services</li><li>• Described a four-part framework to conduct research, data analysis, and data reporting</li><li>• Provided three projects, all related, but limited in scope, to RFP</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• None</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• None indicated</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Provided, indicating professional liability</li></ul>	

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Human Services Research Institute

**DATE:** June 3, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>19.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Offered a comprehensive approach to research, data analysis, and reporting, detailing four primary programmatic tasks that include a six-step reporting process</li> <li>Proposed a wide breadth of relevant data sources: AARP Scorecard, National Health and Aging trends, Residential Information Systems Project, Maine Health Data Organization, and other publicly available sources</li> <li>Proposed collaborating with the Department to conduct meetings and outreach with relevant stakeholders to aid in research and data gathering/vetting</li> <li>Proposed stipends for study participants</li> <li>Proposed use of secured data environments, staff training/testing, and adhering to the Business Associate Agreement with the Department to maintain confidentiality</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>States certain report due dates fall outside performance periods of RFP, though report due dates are specified in Amendment 2 issued under this RFP</li> <li>Proposed submitting Adult Protective Services Annual Report one month prior to date required</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Proposed a detailed work plan for developing reports, indicating timelines/legislative deadlines and other relevant details</li> <li>Did not address documenting data collection events and meetings</li> <li>Did not address how it will facilitate collaboration with Department in determining topics for report infographics and tables</li> <li>Offered a list of elements to be included in a reporting template</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Did not provide time allocations in staffing plan</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Human Services Research Institute

**DATE:** June 3, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>19.04</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,281,000.00</b>	x	<b>35 points</b>	=	<b>19.04</b>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** LW Consulting Inc.

**DATE:** June 6, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>16.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>11.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>18.46</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>45.46</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** LW Consulting Inc.

**DATE:** June 6, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** LW Consulting Inc.

**DATE:** June 6, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>16.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"> <li>Based in Pennsylvania</li> <li>Chief executive officer is from Maine and was selected as a Top 50 Women We Admire of Maine in 2024</li> <li>20 years of consulting experience – highlighted as healthcare compliance and operations</li> <li>Independent Review Organization for the federal Office of the Inspector General – work is related to compliance audits, billing and coding</li> <li>Experience related to compliance, auditing, or consulting but offers no examples of experience involving research and reporting for state agencies with legislative requirements</li> <li>Three projects provided, with two related to quality assurance or a compliance-oriented focus on healthcare service delivery and one which highlighted project management tasks with a reference to assisting with RFP-related reports</li> </ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"> <li>None</li> </ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"> <li>None indicated</li> </ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"> <li>Provided, not indicating professional liability</li> </ul>	

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** LW Consulting Inc.

**DATE:** June 6, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>11.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Proposed use of Monday.com project management software</li> <li>Provided minimal information regarding research, data analysis, or reporting methodology</li> <li>Proposed use of WAVE Web Accessibility Evaluation Tools to check Section 508 compliance</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>For Developmental Disability and Brain Injury plan, proposed a process that focuses on “efficiency” and “efficacy” rather than system of care</li> <li>Minimally responsive regarding its Adult Protective Services State Plan reports</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Report development work plan’s tasks and order of completion were difficult to interpret and offered no concise reflection of timeline intent</li> <li>Proposed use of version control software and setting turnaround times when incorporating report changes</li> <li>Minimally responsive in addressing how it will write summaries of progress towards report development goals, objectives, etc.</li> <li>Proposed submitting final report draft two weeks prior to Department’s submission requirement to Legislature</li> <li>Though proposed use of nondisclosure agreement, did not offer or describe policies or processes for ensuring reports or findings are not disseminated by its staff</li> <li>Proposed monthly meetings to update reports</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Position/job descriptions do not match position titles in organization chart</li> <li>Noted subcontractor tasks</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** LW Consulting Inc.

**DATE:** June 6, 2025

- Offered comprehensive plan for oversight and management of subcontractor for data analysis, though did not indicate use of subcontractors in Part IV. Section II. Organizational Qualification and Experience
- Did not allocate time to nursing facility/long-term care subject matter expert

**3. Implementation - Work Plan**

- Proposed completing a trend analysis after submitting each report draft
- Work Plan indicates that milestones are specific to only Adult Protective Services State Plan

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** LW Consulting Inc.

**DATE:** June 6, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>18.46</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,320,697.93</b>	x	<b>35 points</b>	=	<b>18.46</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** National Opinion Research Center dba NORC

**DATE:** June 9, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>25.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>30.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>22.17</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>77.17</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** National Opinion Research Center dba NORC

**DATE:** June 9, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** National Opinion Research Center dba NORC

**DATE:** June 9, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>25.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Independent research institute, founded in 1941</li><li>• Affiliated with the University of Chicago</li><li>• Experience providing research and data analytics support to public (federal and state) and private entities</li><li>• Cites performance in data analytics, data management, and survey administration and extensive experience collecting and analyzing data on varied topics in health and human services</li><li>• Offered specific examples of work relevant to the RFP, including having performed work for State agencies and providers in Maine</li><li>• Provided three projects, all related to the RFP in addressing Adult Protective Services, AARP, and home and community-based service (HCBS), though the HCBS project does not specify population served</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• None</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• One item indicated, related to a complaint under Equal Employment Opportunity</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Provided financials for CY 2020-23</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided, not indicating professional liability</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** National Opinion Research Center dba NORC

**DATE:** June 9, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>30.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Offered a well-defined approach to report development, including tailoring data collections and analysis for each report, developing a comprehensive work plan, and conducting a landscape analysis</li> <li>Proposed developing and meeting regularly with an advisory council</li> <li>Proposed use of HiSoftware® Cynthia Says™ software for Section 508 compliance</li> <li>Proposed data use agreements to maintain confidentiality of work</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>Proposed a comprehensive report preparation outline, in table format, noting major content and data sources to ensure compliance with LTSS and 34-B M.R.S.A.</li> <li>Proposed a comprehensive Adult Protective Services State Plan report preparation outline, in table format, noting major content and data sources</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Proposed a multi-pronged approach to collecting data/input from stakeholders, tailoring each to a specific report</li> <li>Proposed use of a data exchange portal in obtaining datasets</li> <li>Offered a comprehensive plan on complying with security and confidentiality requirements when obtaining data sets</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Proposed strong combination of subject matter, project management, and data analytics experts</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** National Opinion Research Center dba NORC

**DATE:** June 9, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>22.17</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,099,809.86</b>	x	<b>35 points</b>	=	<b>22.17</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** New Editions Consulting, Inc.

**DATE:** June 6 & 9, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>26.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>23.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>24.53</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>73.53</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** New Editions Consulting, Inc.

**DATE:** June 6 & 9, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** New Editions Consulting, Inc.

**DATE:** June 6 & 9, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>26.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Located in Falls Church, VA</li><li>• States experience performing large, complicated research projects</li><li>• Notes experience conducting work similar to the RFP at the Federal level for the Administration for Community Living's Office of Performance and Evaluation, the Department of Education's Office of Special Education Programs, and the National Institute on Disability, Independent Living, and Rehabilitation Research</li><li>• Intends to partner with organizations and expert/national consultants</li><li>• Provided three projects, all relevant to each of OADS' populations, with one project providing direct technical assistance and reporting-related activities for Centers for Medicare and Medicaid Services that are specific to home and community-based services</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Indicated use of six contractors as subject matter experts</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None indicated</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided, not indicating professional liability</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** New Editions Consulting, Inc.

**DATE:** June 6 & 9, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>23.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Offered a comprehensive description of proposed staged process that includes data inventory and planning, research, data analysis, and reporting</li> <li>Proposed inventorying current data prior to identifying supplemental data sources</li> <li>Proposed a structured process for selecting supplemental data sources</li> <li>Demonstrated capacity to enhance engagement of stakeholders through a client outcomes study</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Proposed a structured process for incorporating feedback into report updates</li> <li>Proposed managing report updates using a change log, multistage review, and iterative refinements</li> <li>Proposed a list of seven topic areas for each progress summary</li> <li>Proposed use of need-to-know access to ensure no reports or findings are disseminated by staff</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Proposed milestones specific to each report</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** New Editions Consulting, Inc.

**DATE:** June 6 & 9, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>24.53</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$994,219.15</b>	x	<b>35 points</b>	=	<b>24.53</b>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 9, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>19.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>22.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>25.31</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>66.31</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 9, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 9, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>19.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Based in Okemos, MI</li><li>• Founded in 2021</li><li>• Current staff have more than ten years' experience with a broad range of health and human services projects for public and private organizations</li><li>• Senior staff have more than 30 years of research experience in university settings</li><li>• Methodology includes data analysis, assessment of performance, data analytics and visualization, and report writing/presentation</li><li>• Cites several examples of work to demonstrate knowledge and experience with aging and disability populations, including a table of grant-funded studies having interim/final reports intended for publication</li><li>• Provided three projects, each, primarily, program evaluation in nature and not RFP-specific</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• None</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• None indicated</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Provided, not indicating professional liability</li></ul>	

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 9, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>22.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Proposed using a social-determinants-of-health framework in its research, data analysis, and reporting</li> <li>Proposed use of ASANA project management software tool to track all activity, including communication, status updates, and stakeholder engagement activity</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Report Development work plan includes references to and tasks of specific working groups</li> <li>Proposed a seven-task change methodology that includes a formal-change order process initiated by Department</li> <li>Offered a well-defined security policy and protocols description, which includes a range of safeguards, from staff training, non-disclosure agreements, security protocols limiting access, and auditing</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Did not provide job descriptions or qualifications</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 9, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>25.31</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,75000</b>	÷	<b>\$963,615.02</b>	x	<b>35 points</b>	=	<b>25.31</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Public Consulting Group LLC

**DATE:** June 10, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>16.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>20.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>17.87</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>53.87</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Public Consulting Group LLC

**DATE:** June 10, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Public Consulting Group LLC

**DATE:** June 10, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>16.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"> <li>• Based in Boston, MA</li> <li>• Founded in 1986</li> <li>• States clients are primarily state, county, and municipal governments</li> <li>• Current contracts in all 50 states; 3000 contracts globally</li> <li>• Offers organizational advantages of: <ul style="list-style-type: none"> <li>➢ Being a person-centered organization</li> <li>➢ Having experience with and understanding of aging/long term services and supports</li> <li>➢ Providing developmental disability and brain injury services and supports</li> <li>➢ Having experience supporting adult protective services</li> </ul> </li> <li>• Experience includes eight projects performed for the State</li> <li>• Provided a chart/description of 15 projects in other states that demonstrate experience with aging/disabled populations, data analysis, and producing reports</li> <li>• Provided three projects, each with examples of work involving two of three RFP-related client populations in other states. Each project focused on compliance monitoring and provider management, neither of which is related to the data research, analysis, or legislative reporting requirements of the RFP</li> </ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"> <li>• None</li> </ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"> <li>• Met requirement</li> </ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"> <li>• Indicated 18 cases</li> </ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"> <li>• Met requirement</li> </ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"> <li>• Provided, indicating professional liability</li> </ul>	



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Public Consulting Group LLC

**DATE:** June 10, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>20.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>Proposed incorporating the principles of the Project Management Body of Knowledge in planning and delivering research, analysis, and reporting deliverables</li> <li>Did not describe how it will coordinate and facilitate communications and meetings, offering a philosophical/theoretical approach as opposed to a logistical framework</li> <li>Offered a comprehensive and clear process in maintaining work and data confidentiality</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>Proposed a report change process that incorporates a feedback loop</li> <li>Offered a robust explanation of its planning for and execution of interest-holder (stakeholder) engagement sessions that included a detailed table, by report type, outlining sample engagement activities</li> <li>Proposed data extraction focuses on data stored in Evergreen. Evaluation Team notes that the Department's reports obtain data that is not exclusive to Evergreen</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Public Consulting Group LLC

**DATE:** June 10, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>17.87</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$1,364,445.42</b>	x	<b>35 points</b>	=	<b>17.87</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** The Urban Institute

**DATE:** June 12, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>16.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>24.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>11.85</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>51.85</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** The Urban Institute

**DATE:** June 12, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** The Urban Institute

**DATE:** June 12, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>16.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Based in Washington, DC</li><li>• Established in 1968</li><li>• Describes having three subdivisions with specialized expertise related to long term services and supports (LTSS), disability, and adult protective services populations</li><li>• Noted experience in collecting, securing, and analyzing a variety of data</li><li>• Provided a description of its unique projection model for forecasting LTSS needs and costs over the coming decades and assessing the impact of various inputs</li><li>• Provided a description of its involvement in national LTSS research and policy development</li><li>• Currently engaged in a project for the California Department of Aging to project LTSS needs among older state residents over the coming decades</li><li>• Provided three projects, each involving an impact evaluation with two of the three using a randomized controlled trial but not aligning with the service systems research for legislative reporting needs of the RFP. The third project focuses on housing in Maine</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Two subcontractors</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Provided an enterprise-wide organizational chart, without reference to the proposed project team</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None indicated</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Provided financials for CY 2021-23</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided, not indicating professional liability</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** The Urban Institute

**DATE:** June 12, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>24.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>• Proposed its User Guide for visualization accessibility</li><li>• Offered a robust description of its data security plan</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>• Offered a comprehensive description of its proposed Dynamic Simulation of Income Model (DYNASIM)</li><li>• Offered a comprehensive description of its proposed five step plan (initial engagement, extraction of Evergreen data, access/use of other data, drafts, and final products) to prepare an Adult Protective Services State Plan annual summary</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** The Urban Institute

**DATE:** June 12, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>11.85</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$2,058,469.00</b>	x	<b>35 points</b>	=	<b>11.85</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Tury Research Institute

**DATE:** June 12, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>9.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>5.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>9.42</b>
<b><u>Total Points</u></b>	<b><u>100.00</u></b>	<b><u>23.42</u></b>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Tury Research Institute

**DATE:** June 12, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Tury Research Institute

**DATE:** June 12, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>9.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Based in Manning, SC</li><li>• Established in 2021</li><li>• Performs research and consultation, specializing in public health, policy evaluation, epidemiology, and advanced data analytics</li><li>• Is prepared to evaluate Maine's SNAP program, which, the Evaluation Team notes, is not part of the scope of this RFP</li><li>• Provided three projects, none of which related to the RFP</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• None indicated</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• None indicated</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Did not provide</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Provided, indicating professional liability</li></ul>	

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Tury Research Institute

**DATE:** June 12, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>5.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>• Did not address how it intends to coordinate and provide research, data analysis, or reporting</li><li>• While listing potential stakeholders, it did not address how it intends to coordinate and facilitate communications</li><li>• Did not address how it intends to reflect the context and scientific basis of findings in Plain Language</li><li>• Did not address how it intends to maintain confidentiality of data</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>• Only lists the reports required and provides no explanation as to what content is proposed for any of the reports: Long-Term Services and Supports, Developmental Disability and Brain Injury, or Adult Protective Services State Plan</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>• Offered a narrative on how it would develop reports but no work plan noting deadlines or identifying tasks</li><li>• Did not address how it intends to incorporate report changes</li><li>• Did not address collection of data or stakeholder input, offering, instead, a description of data quality assurance</li><li>• Did not address facilitation of collaboration with Department, offering, instead, a description of risk mitigation and issue resolution</li><li>• Did not address obtaining datasets, offering, instead, a description of long-term contract scalability and continuity</li><li>• Did not respond to the requirements to describe in detail how it would prepare summaries of progress, submit final reports, ensure no dissemination of reports/findings, or gather new data for report updates</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Tury Research Institute

**DATE:** June 12, 2025

<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Tury Research Institute

**DATE:** June 12, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>9.42</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$2,588,400.00</b>	x	<b>35 points</b>	=	<b>9.42</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** June 13, 2025

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Stacy Martin

**Names of Evaluators:** Jessica Benson-Yang, Doreen McDaniel, Noelle Neault, Craig Patterson, Nicole Rooney

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<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>27.00</b>
Section III. Proposed Services	<b>35.00</b>	<b>32.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>31.11</b>
<u><b>Total Points</b></u>	<u><b>100.00</b></u>	<u><b>90.11</b></u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** June 13, 2025

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** June 13, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>27.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Based in Portland, ME</li><li>• Has prepared many of the reports described in the RFP, including the legislative reports required by 22 M.R.S.A. §50, 34-B M.R.S.A. §5003-A(3), 34-B M.R.S.A. §5003-A(6), and 34-B M.R.S.A. §6004, annual reports on Adult Protected Services trends, and reports comparing resident characteristics across LTSS Residential Care Settings.</li><li>• The Cutler Institute/Survey Research Center has research expertise in all population groups addressed by the RFP</li><li>• Provided a detailed, comprehensive description of its experience, qualifications, and skills to perform the proposed work</li><li>• Notes it partners with the Muskie School's Data Innovation Project for data visualization strategies</li><li>• Provided three projects<ul style="list-style-type: none"><li>➤ Described its performance under current contract providing all of the services required under the RFP</li><li>➤ Described its performance under a past contract as a subcontractor for the federal Centers for Medicare and Medicaid Services project involving evaluation of integrated care models</li><li>➤ Described its performance under a past contract providing support for development of the State Plan on Aging</li></ul></li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Indicates two subcontractors</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• Indicated three cases, two negligence and one speech retaliation</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>6. Certificate of Insurance</b>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** June 13, 2025

- |   |
|---|
| <ul style="list-style-type: none"><li>• Provided, indicating professional liability</li></ul> |
|---|

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** June 13, 2025

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>35.00</b>	<b>32.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• Demonstrated an in-depth understanding of Department data and program rules</li> <li>• Proposed complimentary data gathering/analysis through use of its current federal Centers for Medicare and Medicaid Services Minimum Data Set Access license</li> <li>• Proposed conducting surveys using the Qualtrics platform</li> <li>• Proposed performing checks against biased language in its Plain Language approach</li> </ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"> <li>• For Long-Term Services and Supports, Developmental Disability and Brain Injury, and Adult Protective Services State Plan reports: <ul style="list-style-type: none"> <li>➤ Proposed a well-defined approach to report development and content, with specific reference to current OADS programs</li> <li>➤ Demonstrated an in-depth understanding of the programs and systems to be included in the reports</li> <li>➤ Provided a clear understanding of how it will identify data sources for report analysis</li> </ul> </li> <li>• Proposed performing intellectual developmental disability (IDD) research, which is beyond the scope of the RFP, and offered suggestions specific to IDD system of care reform, e.g., Lifespan</li> </ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"> <li>• Proposed a multi-prong approach for data collection from the various stakeholders</li> <li>• Proposed use of honoraria for focus group participants</li> <li>• Proposed incorporating established staff annual training in data security</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Met requirement</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>• Provided detailed timeline chart for the full period of performance</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting on ADS

**BIDDER:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** June 13, 2025

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal	<b>35.00</b>	<b>31.11</b>

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$696,750.00</b>	÷	<b>\$783.880.00</b>	x	<b>35 points</b>	=	<b>31.11</b>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** 6-30-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** Department of Health and Human Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Extensive overview provided. The bidder has been operating since 2022, is headquartered in Michigan, and has experience in the subject matter pertaining to the RFP. Detailed three projects with clear applicability to the RFP requirements described. Note, one of the projects was with the Office of Aging and Disability Services and the Office of MaineCare Services.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Bidder noted two subcontractors. They provided extensive and clear information about the nature of their working relationship.</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Provided a clear and informative organizational chart.</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>One litigation disclosed</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Met requirement</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Met requirement</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** 6-30-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** Department of Health and Human Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Provided detailed information about their agency's process for project management and coordination. Bidder further provided a comprehensive and detailed plan for the coordination of activities for data acquisition (including identified data sources), data processing, and analysis.</li><li>2. Provided a detailed response outlining their approach to the interest holder engagement process. The bidder described a process and potential interest holders to participate, departmental coordination, and information sharing related to the process.</li><li>3. Bidder described the use of communication experts, standardized tools, and member checking to ensure compliance with Section 508 and Plain Language Standards. Provided details regarding agency process for report production as well as provided examples of prior work to demonstrate capacity.</li><li>4. Provided a detailed response outlining their technological and procedural safeguards to ensure secure protection of data.</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The bidder provided an overall description of their organizational process. However, they did not provide granular information about specific steps in the process beyond what had been shared in other RFP responses. The proposed response addressed the required elements for the activity at a global level. It is unclear how much of the proposed process is for illustrative purposes, as opposed to a literal project plan.</li><li>2. The bidder provided an overall description of their organizational process. However, they did not provide granular information about specific steps in the process beyond what had been shared in other RFP responses. The proposed response addressed the required elements for the activity at a global level. It is unclear how much of the proposed process is for illustrative purposes, as opposed to a literal project plan.</li><li>3. The bidder provided an overall description of their organizational process. However, they did not provide granular information about specific steps in the process beyond what had been shared in other RFP responses. The proposed response addressed the required elements for the activity at a global level. It is unclear how much of the proposed process is for illustrative purposes, as opposed to a literal project plan.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Provided a workplan for the project organized in a Gantt format. The bidder noted that this was an outline, that a more detailed plan would be developed upon award.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** 6-30-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** Department of Health and Human Services

2. The bidder detailed a process where they would incorporate opportunities for feedback and revision in their report production timelines. However, specific details about how this would occur were absent.
3. The bidder referenced their interest holder process described earlier in the RFP. Adding assurances for appropriate recording and distribution as necessary, and further examples of prior work.
4. The bidder described the skills, resources, and technology available to assist in the production of visualizations. The bidder detailed a collaborative process to ensure satisfaction with the final product. Examples of work provided.
5. The bidder detailed their process for obtaining data sets through close collaboration with the department. Some specific details were shared, but the plan was very high level.
6. Detailed a process that includes reports provided the department, weekly check in, and other steps to ensure the Department is kept informed of project progress.
7. Referenced responses to other RFP questions that detailed the production of a final report. In this specific section, minimal details were provided.
8. The bidder described an organizational culture that supports security and practices to ensure confidentiality. Specific details about how confidentiality will be assured were not provided in this section.
9. The bidder referenced their workplan and described an iterative process for ingesting new data to enhance reports. However, no specific information was provided in this response.

## **2. Staffing**

- a. Detailed, clear, and informative job descriptions were provided as requested.
- b. The bidder provided a robust plan to engage and support their work with their subcontractors.
- c. A detailed staffing plan was provided as requested

## **3. Implementation - Work Plan**

- a. Provided a detailed workplan outlining all of the activities they described in their proposal.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Altarum Institute

**DATE:** 06/30/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Based in Novi, Michigan, with Maine-based team members</li><li>• Not-for-profit organization</li><li>• Cite 20+ years of history working for the State of Maine</li><li>• Established Altarum Medicare-Medicaid Services for States (AMMS) and Palladian Partners, Inc. as subsidiaries</li><li>• Cite expertise in aging and disability, research, analytic and reporting capabilities, programmatic and operational knowledge, hands-on expertise, and communications experience</li><li>• Three projects are provided</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Altarum Medicare-Medicaid Services for States</li><li>• Palladian Partners, Inc</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Requirement is met</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• One case is listed, alleging age discrimination (settled)</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Financial statements/independent auditor report provided for 2021, 2022, 2023</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Certificate dated 2/26/2025 is provided; professional liability coverage is not noted</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Altarum Institute

**DATE:** 06/30/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. The Bidder will use their own web survey platform - Altarum Secure Cloud Network (ASCN); they explained their plan to collect primary and secondary data, including a chart of data sources; they explained their plan to analyze the data</li><li>2. They listed their Maine contacts, and their plan for stakeholder engagement; they provided a flow of the process</li><li>3. The Bidder cites communications experts who specialize in creating a variety of products that meet Section 508 accessibility and Plain Language standards; they gave specifics on their plan to produce data visualizations</li><li>4. The requirement is met</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. The Bidder provided details on how the required long term services and supports reports will be produced</li><li>2. A detailed plan is provided to produce the required developmental disability and brain injury services reports</li><li>3. The Bidder provided details to meet the requirements related to the adult protective services reports</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. The requirement is met</li><li>2. The requirement is met</li><li>3. The Bidder provided detail on their plans to collect data and input; including scheduling and facilitating meetings and other events, and documenting this activity; they are prepared to offer options based on previous work</li><li>4. The Bidder explain in detail how their Report and Communications Team will conduct this work</li><li>5. The requirement is met</li><li>6. An outline is provided on how they intend to meet the requirement to write summaries of their progress</li><li>7. The requirement is met</li><li>8. The requirement is met</li><li>9. The requirement is met</li></ol>
<b>2. Staffing</b>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Altarum Institute

**DATE:** 06/30/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

- |   |
|---|
| <ul style="list-style-type: none"><li>a. The Bidder provided job descriptions and summary qualifications of the project team</li><li>b. The subcontractors are overseen by the president/CEO; The Project Manager is responsible for the work of the entire team, which includes the subcontractors</li><li>c. The requirement is met</li></ul> |
|---|

<b>3. Implementation - Work Plan</b>
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- |  |
|--|
| <ul style="list-style-type: none"><li>a. A Gantt chart is provided</li></ul> |
|--|

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
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- |   |
|---|
| <ul style="list-style-type: none"><li>• \$1,587,462.11 total fixed cost</li></ul> |
|---|

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** 6/30/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• 80 years of experience in state/federal LTSS requirements</li><li>• 20 years of experience providing data and reporting services for Maine</li><li>• Two of three projects cited appear relevant. One of the three involves a recent project for OADS with a related population (dually eligible individuals)</li><li>• Q: Third project for CT Office of Health Strategy explains how it is relevant to this RFP (e.g., series of state research reports), however, unclear how each report cited is directly related to LTSS?</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Two subcontractors noted (Paladian and AMMS, subsidiary)</li><li>• Q: AMMS description, unclear as to how the organization has experience in the subject matter described? Description states subject matter expertise, but does not explain how the organization has subject matter expertise in the areas cited?</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• Organizational chart provided</li><li>• Chart only illustrates project team and does not provide additional details about upper-level management instruction</li><li>• Chart does not explain what roles maybe held by sub-contractors</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• One case settled in 2024 for an undisclosed amount.</li><li>• Case was related to employment discrimination allegation</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Statements submitted for CY 2021-2023</li><li>• CY 2024 was not submitted</li><li>• A loss was reported in CY 2023</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Valid Acord form provided, unable to locate professional liability coverage</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** 6/30/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P: Addresses coordination across project management workstreams (specific to engagement, analytic, report and communication functions). States that each workstream is guided by a lead. Proposal also includes a description of the project management approach that addresses 7 related areas (e.g., cost management, scope, staffing etc. Describes highly detailed stages and processes for obtaining primary and secondary data sources.</li><li>2. P: Stakeholder engagement approach clearly explained and offers opportunities for interested parties to provide feedback on report contents. Includes helpful visual illustrating engagement process.</li><li>3. P: Solid explanation to plain language content development, which includes algorithms to ensure appropriate reading levels and consolidated visuals. Proposal also includes helpful samples of visual displays.</li><li>4. Data security and info sharing protocols meet requirements</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. LTSS report description meets requirements</li><li>2. IDD/BI report description meets requirements</li><li>3. APS report description meets requirements, however, description of 5 year plan is less developed in comparison with the rest of the report types.</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Met requirements</li><li>2. Met requirements</li><li>3. Met requirements.</li><li>4. P: Includes high-quality examples of infographics</li><li>5. Met requirements</li><li>6. Met requirements</li><li>7. Met requirements</li><li>8. Q: report dissemination provides information regarding staff training, but what else about the secure system prevents unauthorized disclosures?</li><li>9. Met requirements</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Met requirements</li><li>b. Proposal includes additional information regarding how subcontractors work with Altarum and states Senior Director position oversees the two relationships.</li><li>c. Met requirements</li></ol>
<b>3. Implementation - Work Plan</b>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** 6/30/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

a. Met requirements
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**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Altarum Institute

**DATE:** 6/30/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• P-provided- based In Novi Michigan</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• P-Yes- AMMS, and Palladian Partners</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• P-provided</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• 1- Age Discrimination</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• P-provided 21,22,and 23</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• P-provided but no listing of Professional Liability coverage</li></ul>

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>1. P- detailed plan -provided including primary and secondary data collection</li><li>2. P-Very detailed plan w/6 steps fpr Stakeholder engagement</li><li>3. P-very detailed plan includes use of Flesch Reading Ease test</li><li>4. P-provided</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>1. N-use of data already collected in Dually-eligible project</li><li>2. Q-Plan includes use of anonymous satisfaction survey</li><li>3. P-Very detailed plan provided</li></ul>
<b>C. Report Development</b>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Altarum Institute

**DATE:** 6/30/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

1. P-Detailed plan provided with Gaant Chart
2. P-provided
3. P-plan provided includes use of quarterly Stakeholder meetings
4. P-Provided
5. P-Provided
6. P-Detailed plan provided
7. P-provided
8. Q-Plan provided includes only training, no reference to data use agreement
9. P-Provided but brief
<b>2. Staffing</b>
a. P-Staffing plan provided
b. P-Provided plan which includes working directly with both Subcontractors
c. P-provided
<b>3. Implementation - Work Plan</b>
a. P-plan provided including Gaant chart

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** June 30, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• 20 year history supporting the State of Maine, 40+ states</li><li>• Altarum states they have 80 years history</li><li>• Employs 250 public health professionals</li><li>• Has subsidiary of Altarum Inst called Altarum Medicare- Medicaid Services for States (AMMS) which was established I 2022 to help stated create solutions for dually eligible indiv to advance health, wellness person centered living and HCBS.</li><li>• Has subsidiary Palladian Partners, Inc. – has a team of award winning communicators, digital strategists, researchers and creatives in the space of public health.</li><li>• Altarum and AMMS worked with OADS to produce a landscape data chart pack of dually eligible population demographics, characteristics, health care utilization and Medicare enrollment to inform program evolution and target strategies</li><li>• 40+ year hx of successful data analysis and research including qualitative quantitative and mixed methods data collection</li><li>• Provided relevant examples re: data research, reporting and stakeholder communication across state and federal agencies.</li><li>• Three projects: 1. Conneticut Office of Health Strategy: legislative report for ast three years with stakeholder coordination. Reports include analysis of hospital and healthcare mergers and acquisitions, second report an inventory of critical, existing healthcare facilities, equipment, and providers operating in the state, and determination of the adequacy of this supply and where gaps exist within the state. Third report: to explore trends in social, economic and public health factors that impact state health outcomes. 2. Maine DHHS dual needs improvement project 3. Ct Poolicy and Management which analyzes state IDD service delivery</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• AMMS</li><li>• Palladian</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	
<b>4. Litigation</b>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

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**DATE:** June 30, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

<ul style="list-style-type: none"><li>• One: age discrimination. Settlement April 2024</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• 2021, 2022, 2023</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Met but no professional liability indicated</li></ul>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** June 30, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Experience across all relevant populations required by this RFP<ul style="list-style-type: none"><li>• Study populations as a whole and by sub groups</li><li>• Has a clear, detailed research and data analysis, reporting framework methodology</li><li>• Key component of their research entails maximizing data and the importance of data acquisition</li><li>• Has secure systems in place for data storage and management</li><li>• Will collect quantitative (survey) and qualitative (listening sessions and key informant interviews data for each required report</li><li>• Primary data acquisition via survey</li><li>• Secondary data acquisition from numerous data sets such as national survey data, census and health care claims data</li><li>• Provides details list of possible data sources to be leveraged</li></ul></li><li>2. met</li><li>3. leverages standard readability algorithms include flesch reading ease test and flesch Kincaid grade level score<ul style="list-style-type: none"><li>• acknowledges 508 requirements</li><li>• provides examples of data visualization</li></ul></li><li>4. met<ul style="list-style-type: none"><li>• will use strategies such as restrictive access, two factor authentication, background checks, detailed security plan and record retention policies</li></ul></li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. <b>LTSS Reports:</b> Detailed framework provided with recognition of statutory requirements for data and required information<ul style="list-style-type: none"><li>• Identifies potential external data sources relevant for report comparison and analysis</li></ul></li><li>2. <b>IDD/BI/ORC:</b> Detailed framework provided with recognition of statutory requirements for data and required information</li><li>3. <b>APS:</b> Detailed framework provided with recognition of statutory requirements for data and required information</li></ol>
C. Report Development

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Altarum Institute

**DATE:** June 30, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

1. met
2. met
3. Bidder describes detailed stakeholder engagement process (SAG)
  - Following documented sessions will provide analysis and SWOT report
4. Team has expertise in excel indesign, canvam photoshop, illustrator and infographic design
5. met
6. Written monthly progress reports in additional to reg meetings during project meetings. Reports will include but not limited to: tasks completed, decision points, outstanding items and summary of progress
7. Met. minimal response
8. met
9. met

**2. Staffing**

- a. met
- b. met
- c. met

**3. Implementation - Work Plan**

- a. met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care (AFMC)

**DATE:** 5-15-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Detailed descriptions of previous and current experience with work similar to what is described in RFP were provided.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Noted no intended use of subcontractors.</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Organization and personnel information provided</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>Noted prior litigation</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Sufficient information provided</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided certificate as requested.</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care (AFMC)

**DATE:** 5-15-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. The description provided lacked detail.</li><li>2. A clear and thoughtful plan was presented.</li><li>3. Description provided lacked detail.</li><li>4. More details about the worker/work level protocols to ensure data security are needed.</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Demonstrated capacity through description of prior work. Specific details of how the state requested report would be created are missing.</li><li>2. Specific details about how activities would be carried out are missing from the description provided.</li><li>3. Described activities beyond the scope of the requested services</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. A Gantt chart provided an outline of the timeline of project implementation.</li><li>2. The revision process is clear and well described.</li><li>3. The process is clear and well described The focus group/stakeholder input is well described in the narrative, but not well integrated into the Gantt chart.</li><li>4. The proposed process was clearly presented.</li><li>5. The revision process is straightforward and well described.</li><li>6. The proposed process was clearly presented.</li><li>7. The proposed process was clearly presented.</li><li>8. The revision process is straightforward and well described.</li><li>9. The revision process is straightforward and well described.</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Job descriptions were provided for some support staff, but not all.</li><li>b. No subcontracting planned</li><li>c. There appears to be a lack of congruence between the manager of outreach services job description and project role.</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. Implementation plan did not fully align with previously described Gantt chart.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Arkansas Foundation for Medical Care, Inc.

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Experienced with the public sector, working with multiple state governments and agencies</li><li>Knowledge and experience with collecting health data, including Medicare and Medicaid</li><li>Experience/focus in quality improvement</li><li>Relevant, multiple corporate certifications</li><li>Three relevant projects provided in detail</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>The Bidder does not intend to use subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Not-for-Profit organization led by board of directors</li><li>Key personnel are identified and include data sciences, quality, outreach</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>One litigation listed related to employee allegation of discrimination</li><li>Settlement reached</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Independent auditor report provided for 2022-2024</li><li>No audit findings/concerns noted</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided, dated 8/8/2024</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Arkansas Foundation for Medical Care, Inc.

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Use of Research Electronic Data Capture (REDCap) software; addressed in detail, including how they will coordinate and collect data, conduct analysis, use Department templates</li><li>2. Provided a detailed response that is consistent with the expectations</li><li>3. Bidder provided details regarding plain language requirements</li><li>4. Bidder explained their process to safeguard their work</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Referenced use of in-depth experience and subject matter experts with long term services and supports</li><li>2. Bidder met requirement</li><li>3. Bidder intends to use State data, as well as federal/national sources (National Adult Maltreatment Reporting System and National Center on Elder Abuse)</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Chart/table provided with required details</li><li>2. A change management process will be in place for report revisions</li><li>3. Bidder provided details about their approach to data collection/input from a variety of sources</li><li>4. The Bidder described their process to collaborate with the Department</li><li>5. The process of obtaining and analyzing data is described</li><li>6. Bidder met the requirement</li><li>7. Bidder provided details on plans to provide draft and final reports</li><li>8. Bidder described their internal controls in detail</li><li>9. Bidder met the requirement</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Project team of 8; titles/roles/job descriptions are provided</li><li>b. No subcontractors will be used</li><li>c. A detailed staffing plan is provided</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. A detailed work plan is provided</li></ol>
Part IV, Section IV. Cost Proposal and Budget Narrative
<ul style="list-style-type: none"><li>• \$1,284,947.33 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care

**DATE:** 5/12/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• I: The organization's history cites 50 years of public health and human service related partnerships</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• P: chart lists personnel with both data science and LTSS subject matter expertise</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• I: one settlement agreement signed in November 2022</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met requirements</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met requirements</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care

**DATE:** 5/12/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>1. Q: unclear as to how bidder plans to use department provided data as described in 1a</li><li>2. P: cites appropriate qualitative research methods for data collection</li><li>3. N: unable to locate supporting reference for the use of certified plain language expertise (item 3)</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>1. P: LTSS report description includes previous work highlighting informative, easy to understand data displays (i.e., 2023 risk factors summary)</li><li>2. N: Developmental Disability related reports description (item 2) appears to restate the RFP description, no additional information provided except for citing platforms for data collection and analysis</li><li>3. I: APS related reports also reference dashboarding which is not a required data display for this RFP</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>1. P: well organized milestone chart with realistic timeframes that align with major deadlines presented</li><li>2. Q: Facilitate stakeholder meetings referenced in Year 1 of workplan, stakeholder meetings may be needed in subsequent years. However, this might be addressed in annual data updates referenced Year 2 and beyond?</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>a. P: identifies a balanced team of professionals with appropriate levels of expertise (e.g., project manager, data scientists, communication)</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>a. Meets requirement (only initial period described in attachment 9, but milestones for renewal 1 and 2 periods are addressed earlier in the proposal)</li></ul>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care

**DATE:** 5/15/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• Q-No reported history of providing reports in line with OADS needs	
<b>2. Subcontractors</b>	
• No subcontractors	
<b>3. Project Team Organizational Chart</b>	
• P-provided, detailed	
<b>4. Litigation</b>	
• Q-Provided, previous lawsuit	
<b>5. Financial Viability</b>	
• P-provided	
<b>6. Certificate of Insurance</b>	
• P-Provided	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care

**DATE:** 5/15/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>1. Q-No reported experience with Reporting in line with OADS needs</li><li>2. Q-Use of uncommon assessment tool?</li><li>3. P-plan to use plain language</li><li>4. P-provided but brief</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>1. P- Provided a very detailed plan with associated timelines</li><li>2. P- Provided plan – very brief</li><li>3. P-Provided plan</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>1. P-provide plan with timelines</li><li>2. P- Provided detailed plan to provide reports and make any necessary changes as directed by the Department</li><li>3. P-Provided includes use of RedCap</li><li>4. P-plan includes data visualization planning session</li><li>5. P-provided plan</li><li>6. P-Provided plan</li><li>7. N-lacks detailed timeline</li><li>8. P-provided plan includes Access control, confidentiality agreements ,Approval Workflow, Training and compliance and monitoring</li><li>9. Q-update internal databases?</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>a. P -Very detailed staffing plan</li><li>b. P-staffing seems adequate</li><li>c. Q- smaller organization?</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>a. P-This plan would seem to align with O.A.D.S needs</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care (AFMC)

**DATE:** 5/14/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• 50 years experience</li><li>• States they serve as key partner in Medicare, Medicaid, DOJ, HRSA and SAMSHA Initiatives</li><li>• Members of senior team have served as previous state leaders</li><li>• Their multistate presence supports work in Health data collection, analysis, and customized reporting , program and performance evaluations and Quality improvement initiatives</li><li>• 1 of 14 subcontractors for subcontractor to one of 14 quality improvement networks (QINs) or quality improvement organizations (QIOs) within the Centers for Medicare &amp; Medicaid Services (CMS) program</li><li>• Corporate certifications: HEDIS, HEDIS Measures, Accredited HUM, Certified Contact Center</li><li>• Teams includes SAS certified data scientists</li><li>• Uses REDCAP web based data mgt tool and Esri® ArcGIS® Online for data visualization and analysis</li><li>• 3 projects: State of New Hampshire Bureau of Drug and Alcohol; State of Arkansas CHIP Survey; State of Arkansas Hospital to Home</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Does not plan to use subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Settlement 2022 for \$5,500 Employee Complaint</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Financial Statements provided June 30, 2024, 2023, and 2022</li><li>• No concerns</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met and valid through 8/25</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care (AFMC)

**DATE:** 5/14/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"><li>• Emphasis on strong community and stakeholder engagement</li><li>• Primary data collection methods will include: key informant interviews, focus groups, and surveys administered through Electronic Data Capture</li><li>• Participants will be selected through validated data stratification methods approved by Department to include representation from various age, disability and geographic regions</li><li>• reports will be written in plain language and 508 compliant</li><li>• Facilitate department approved stakeholder engagement using MS teams or Department provide virtual platform</li><li>• Will maintain stakeholder engagement plan and provide engagement materials in advance</li><li>• Will conduct annual site visit in addition to virtual meetings</li><li>• AFMC has communication experts on staff certified in health literacy</li><li>• Will use layered approach to ensure maximum protection and store on HIPAA compliant services using: role based access control, quarterly audits, secure file transfers and controlled data dissemination. Quality audits include review of log in activity and file management of administrative log ins.</li></ul>
B. Required Reports
<ul style="list-style-type: none"><li>• Afmc states they have produced similar reports for other states such as AFMC risk factor report. This report included 90 diff indicators collected from various sources and they use plain language, clear visuals and companion online interactive dashboard for comparative years to enhance accessibility.</li><li>• AFMC states they will incorporate data from the federal OAA SPA</li><li>• AFMC has 100 combined years of LTSS expertise.</li><li>• Met</li><li>• Will incorporate comparative data from other states as well as publicly funded data such as National Center on Elder Abuse, National Adult Maltreatment Reporting etc.</li></ul>
C. Report Development
<ul style="list-style-type: none"><li>• Met- some turn around dates appear aggressive</li><li>• Table is well organized and laid out</li><li>• Will use structured change management and document revision process</li><li>• AFMC will use surveys, key informant interviews, focus groups and public listening sessions to collect data and input</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Arkansas Foundation for Medical Care (AFMC)

**DATE:** 5/14/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

- Early in ach reporting cycle, will host visualization planning session with Department.
- Sessions will include review of preliminary data, trends and highlights, discussion of goals for target audiences, key metrics and recommendations for visuals for department review and approval
- Data analysis will include descriptive statistics, trend and comparative analyses, geographic variation mapping and core indicator measurement
- met
- Will comply with Department approved templates, revisions will be tracked through project mgt. tools
- P: Will ensure appropriate dissemination practices through: access control, confidentiality agreements, approval workflow, training and compliance and monitoring.
- P: will maintain a calendar of expected data updates from Department and federal databases

## **2. Staffing**

- a. 8 staff identified with specific program eval, data collection, analysis and reporting. Job descriptions provided.
- b. Met- will not use any
- c. Met

## **3. Implementation - Work Plan**

- a. Met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Datagain

**DATE:** 5-15-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>Overview of prior projects lacked a detailed description of the work provided and applicability to currently requested services in the RFP.</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>No stated use or intention of using subcontractors or consultants.</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>Information was provided about team members and their roles. However, the organizational information did not include information about the organizational hierarchy and structure.</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>No litigation disclosed</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>Provided detailed information as requested</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>Provided as requested</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Datagain

**DATE:** 5-15-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Bidder described how they propose to ensure that general requirements are satisfied, with sufficient clarity and detail.</li><li>2. Described in sufficient detail.</li><li>3. Described in sufficient detail</li><li>4. Exceptionally well described plans for ensuring data security</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. Detailed plan for how to ensure compliance with stated requirements</li><li>2. Detailed plan for how to ensure compliance with stated requirements</li><li>3. Detailed plan for how to ensure compliance with stated requirements</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Plan was provided, but inclusion of legislative timelines is not clear</li><li>2. Detailed plan for revisions provided</li><li>3. All requirements are addressed in a clear and detailed plan</li><li>4. Feedback process was clear and thorough</li><li>5. Data acquisition process well described</li><li>6. Detailed and clear information provided</li><li>7. Clear and detailed response provided</li><li>8. Reasonable response, additional details would be beneficial</li><li>9. Clear and well described plan for obtaining updated data as needed</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Descriptions provided lacked detail and organizational structure information</li><li>b. No stated use or intention of using subcontractors or consultants.</li><li>c. Plan provided lacked detail</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>d. Visual timeline was not provided.</li><li>a. Detailed work plan was described</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Datagain, Inc.

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS, Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Experience working with federal and state agencies on work related to social services, health care, and adult protective services</li><li>• Work history includes data analysis, stakeholder engagement, program evaluation, and compliance/reporting</li><li>• Strength in data security</li><li>• Three relevant projects are provided</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• The Bidder does not intend to use subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• A chart is not provided</li><li>• The Bidder provided a list of project team members, including a project director, project manager, and 13 additional roles</li><li>• The project team includes research/data staff, report writers, quality assurance team members, among others</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• The Bidder indicates no litigation during the past 5 years</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Balance sheets, profit/loss statements for 2021-2023 provided</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Certificate provided has redacted data for a policy with expiration dates in 2020</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Datagain, Inc.

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS, Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. The Bidder provided details on how they intend to manage this project, including development of a protocol to collect and analyze data</li><li>2. Bidder will hold monthly virtual meeting and communicate regularly</li><li>3. Bidder provided details on their experience and ability to use plain language best practices, and meet other requirements</li><li>4. Bidder met this requirement</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. The LTSS reports, including incorporating Older Americans Act State Plan on Aging data, is detailed</li><li>2. A plan to provide the required Developmental Disability and Brain Injury Services reports is provided</li><li>3. Bidder details their strategy to provide the Adult Protective Services reports</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. The Bidder provided a detailed work plan</li><li>2. Bidder explained in detail how they will provide draft reports and incorporate feedback for producing the final versions.</li><li>3. Bidder met the requirement</li><li>4. The Bidder will collaborate with the Department to ensure deliverables are correct and timely</li><li>5. A detailed approach is provided, including how data will be requested, secured, and analyzed</li><li>6. The Bidder met the requirement</li><li>7. A multi-staged approach will be used</li><li>8. The Bidder will ensure confidentiality of its work</li><li>9. Bidder intends to follow a process to ensure data is updated and reflected in reports</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. A variety of roles/experts will be used; job descriptions are provided</li><li>b. No subcontractors will be used</li><li>c. A list of staff roles is provided with key responsibilities; no time allocation is noted</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. A work plan describing a 12-month reporting cycle is provided</li></ol>

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
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**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Datagain, Inc.

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS, Office of Aging and Disability Services

- |  |
|--|
| <ul style="list-style-type: none"><li>• \$696,750 total fixed cost</li></ul> |
|--|

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Datagain

**DATE:** 5/13/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Q: unable to determine how the reported 3 projects in the last 5 years reflect related experience for this research and reporting contract. Examples appear small in scope or unrelated (limited data sets, description includes acronyms, topics appear unrelated as music and politics are cited in 2 descriptions)</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Not applicable</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>P: The organizational chart depicts appropriate team structure with a role dedicated to report creation and content development</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>Not applicable</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>I: Most recent calendar year not included (2024); three years submitted for 2021, 2022, 2023</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>N: unable to determine validity of insurance certificate as the effective date is redacted</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Datagain

**DATE:** 5/13/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
1. Met requirements
<b>B. Required Reports</b>
1. P: each report type includes appropriate data elements
<b>C. Report Development</b>
1. I: somewhat aggressive timeline of milestones outlined in first 3 months 2. Q: unable to locate when 508 accessibility checks would be completed on deliverables in the timeline 3. P: Proposal cites feedback loops with the department for report iteration which is important 4. P: Proposal includes the option of in-person interested party events if desired
<b>2. Staffing</b>
a. N- inconsistent description is used for the role focused on survey development and report writing. This role appears responsible for drafting the final report and requires a bachelor's degree, instead of a more advanced graduate degree.
<b>3. Implementation - Work Plan</b>
a. P: Clear timeline with milestones for year 1 report preparation b. N: Workplan does not address milestones for updating future or re-occurring reports

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Datagain

**DATE:** 05/15/2025

**EVALUATOR NAME:** Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
•	P-highly educated upper management
<b>2. Subcontractors</b>	
•	Q-No subcontractors
<b>3. Project Team Organizational Chart</b>	
•	Q-small team
<b>4. Litigation</b>	
•	P-no litigation
<b>5. Financial Viability</b>	
•	P-provided
<b>6. Certificate of Insurance</b>	
•	P-Provided

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Datagain

**DATE:** 05/15/2025

**EVALUATOR NAME:** Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Q-Agency reports no experience with Reports in line with OADS needs</li><li>2. P- Agency has experience with a variety of assessments</li><li>3. Q-not clear about which assessment tool would be used</li><li>4. P-Ability to gather wide range of data</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P-Agency has plan to meet OADS reporting needs w/ timeline</li><li>2. P- Can use templates</li><li>3. N- -fast timeline?</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. P-Detailed plan for providing reports</li><li>2. P-Will change reports as directed by Department</li><li>3. P-Met requirement</li><li>4. P-met requirement</li><li>5. P-Met requirement</li><li>6. P-met requirement</li><li>7. P-Multi stage approach</li><li>8. P- met requirement</li><li>9. P-Met requirement</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Q-Provided but vague? -</li><li>b. P-met requirement</li><li>c. Q-time allocation?</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. N- in line with OADS needs, but sometimes vague around timelines</li></ol>
<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• P-Provided</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** DataGain

**DATE:** 5/14/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Provides statements of experience with no organization detail or company background.</li><li>Provides three projects with very little description: University of Arizona, Spotify, University of Pittsburg</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Met- will not use any subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Provided list of positions but not in org chart visual</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>Met- none</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Appears viable</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Met but expired</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** DataGain

**DATE:** 5/14/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"><li>• will work with Department to finalize work plan and data collection procedures such as interview and survey protocols.</li><li>• Project Mgt; Did not generally provide a lot of specificity in this section but state they will ensure consistent communication through progress reports, emails and virtual meetings.</li><li>• State that in the first 2 months they will work with Department to develop and regain data collection protocols proposing utilizing 4 primary methods: review of de-identified data, in-depth interviews/focus groups, surveys and listening sessions.</li><li>• Will use comparative data from other states on similar topics to enhance analyses.</li><li>• Survey data will be imported into Stata. Qualitative data will be updated into MAXQDA, a qualitative data software.</li><li>• Primary point of contact from team will be designated and responsible for coordinating all communication and facilitating meetings.</li><li>• Will host 1x per month virtual meetings</li><li>• Ad hoc emails and phone calls</li><li>• plain language for all deliverables</li><li>• Supplementary details of report will be included in annex to prevent main documents from becoming too overwhelming</li><li>• Will include definitions section</li><li>• Will use evidence based communication</li><li>• Will comply with 508 requirements</li><li>• Will use double spacing, larger fonts and bold text to highlight key points/data. Graphics will be minimal and clean</li><li>• Will use approvals for data release, data agreement and security, will use de-identified data, and aggregate data</li><li>• Will obtain consent for recording</li><li>• Confidentiality through authorized personal access</li></ul>
B. Required Reports



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** DataGain

**DATE:** 5/14/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

- Biennial Summary of LTSS System: Will use historical and statistical analysis
- Biennial Comparison LTSS Res Setting Characteristics- will compare using document review, statistical and descriptive analysis and staff interviews
- Report LTSS Resource Allocation- includes documents on program goals, financials, population demographics, OAA data and stakeholder engagement
- LTSS reporting overall had limited details as to what kind of data points they may use.
- Compile existing resources to assist with identifying gaps such as service delivery, financials, staffing ratios, reportable events and waitlists
- To ensure compliance with ACL five-year APS plans Datagain will take the following steps: document review and contextualization, process eval, financial review and data projections.

**C. Report Development**

- Organized and simple to read. Deadlines are not date specific but by month, week which is difficult to determine date. Did not capture legislative or statutory deadlines so unable to determine if timeline meets deliverables.
- Met but does not indicate estimated times to incorporate feedback
- 
- 2-3 in person events may be scheduled if necessary but majority of meetings will be scheduled virtually
- Will have point of contact for all communication. Indicates meetings and events to be scheduled in advance but no mention of material preparation or pre view prior to meetings.
- Prior to writing of report, Datagain will conduct initial presentation of data to Department to review findings, gaps and unexpected findings and questions.
- Based on discussions with Department, Datagain will identify key topics for visualization. Datagain will recommend specific data points and data insights.
- met
- Will follow structured process of a written request of data to Department, request format and years of data needed for trending/historical analysis.
- Will work closely with the Department to establish reasonable timeliness of data request. Request will be made early enough so that team can conduct quality check to identify any data issues.
- Data will be transferred encrypted/secure.
- Unclear how data will be tracked and documented

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** DataGain

**DATE:** 5/14/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

- Report submission and feedback will be submitted to department in month 9 of 12 month reporting period. Incorporating feedback into month 10. Finalization of report by 3<sup>rd</sup> week of month 11.
- Data team will sign non-disclosure and confidentiality statements
- met

**2. Staffing**

- a. Met
- b. Met- no subcontractors
- c. met

**3. Implementation - Work Plan**

- a. Met but is very general and groups deliverables in a several month span.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate LLC

**DATE:** 5-15-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Detailed description of the organization was provided.</li><li>Examples of prior work were well described with clear applicability to current RFP.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>No intention to use subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Provided as requested with sufficient detail</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>No litigation reported</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Provided as requested with sufficient detail</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate LLC

**DATE:** 5-15-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. A comprehensive and detailed plan was provided</li><li>2. A comprehensive and detailed plan was provided</li><li>3. A thorough and detailed plan was presented</li><li>4. Data security plan was detailed and clear</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. A detailed plan was provided that detailed how all stated requirements would be met.</li><li>2. A detailed plan was provided that detailed how all stated requirements would be met</li><li>3. A detailed plan was provided that detailed how all stated requirements would be met</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. A narrative and visual timeline was provided.</li><li>2. Plans to incorporate changes were clear and detailed</li><li>3. A detailed and comprehensive plan was presented</li><li>4. Sufficient response provided</li><li>5. Clear data security plan provided</li><li>6. Clear, timely, and meaningful plan presented</li><li>7. Sufficient response provided</li><li>8. Detailed plan provided</li><li>9. Sufficient response provided</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Clear and detailed staffing information provided</li><li>b. No intention to use subcontractors</li><li>c. Clear and detailed staffing information provided</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Comprehensive and clear plan described</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Delineate LLC

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Experience with providing consulting and professional services work for federal and state government agencies</li><li>• History with data-related projects, research, reporting, and outreach</li><li>• Evidence-based services/products</li><li>• Leadership team well-versed in aging and long term services and supports, federal block grants, and data science</li><li>• Bidder provider three detailed, relevant projects</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• The Bidder does not intend to use subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• An organizational chart is provided, showing the structure/interaction between the Bidder and Department</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• The Bidder indicates no litigation activity during the past five years</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Bidder provide balance sheets and profit/loss statements for 2022-2024</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• A certificate dated 5/6/2025 is provided</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Delineate LLC

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. A very detailed description is provided on their framework and strategy to meet this requirement, including explanations on how expectations will be developed, and how research and data-gathering will be conducted</li><li>2. The focus of communication will be based on transparency, clarity, and preparation</li><li>3. A very detailed description is provided on how they intend to meet this requirement</li><li>4. Use of Databricks platform</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The Bidder provided a very detailed description of producing the required Long Term Services and Supports reports</li><li>2. The Bidder provided a very detailed description of producing the required reports for Developmental Disability and Brain Injury Services</li><li>3. Bidder met the requirement, and included Maine-specific details they researched</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. A work plan is provided with deadlines and other details</li><li>2. The Bidder detailed the plan to ensure report changes are incorporated into the final product</li><li>3. Data collection will occur through work sessions, public forums, and other events</li><li>4. This requirement is met</li><li>5. Bidder indicates an understanding and plan to comply with the required timelines</li><li>6. Bidder provided a detail description on how they propose to meet this requirement</li><li>7. This requirement is met</li><li>8. Staff will be properly trained to follow rules and protocol with regarding to storage and use of data</li><li>9. This requirement is met</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Use of a cross-functional team; roles and responsibilities are provided, including executive sponsor, director of delivery, engagement manager, data analytics staff, and several others</li><li>b. The Bidder does not intend to use subcontractors, but if the needs arises they will work with the Department</li><li>c. A staffing plan is included</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. A very detailed work plan is included</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Delineate LLC

**DATE:** 05/14/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$1,488,250.08 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate

**DATE:** 5/14/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• P: 10+ years of public health experience, which includes work with state governments</li><li>• I: Each of the three project descriptions cited included connections to research and evaluation of public health programs, sample data/report displays also included</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate

**DATE:** 5/14/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>1. P: Proposal cites clear evidenced based approach to gathering and reporting on data</li><li>2. P: Each requirement (data analysis/reporting, coordination, summarizing results, confidentiality) includes appropriate thorough description of how the requirement will be met.</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>1. P: LTSS related report cites valuable data sources, including MDS 3.0</li><li>2. P: DD/BI report development includes comprehensive approach to collecting information from multiple data sources to meet legislative reporting requirements.</li><li>3. P: APS reports includes robust proposal for completing a comparative analysis</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>1. Meets requirements</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>a. P: Solid staffing plan with a good balance of LTSS SME, data analytics and research/evaluation</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>a. Meets requirements</li></ul>

## INDIVIDUAL EVALUATION NOTES

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate LLC

**NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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### **Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	Q- No reported history of providing reports consistent with OADS Reporting needs.
<b>2. Subcontractors</b>	
	Q- No subcontractors listed.
<b>3. Project Team Organizational Chart</b>	
	P- Information provided, small team.
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• P-Litigation history provided.</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• P-Information related to financial viability provided.</li></ul>
<b>6. Certificate of Insurance</b>	
	P-Certificate of Insurance provided.

## INDIVIDUAL EVALUATION NOTES

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate LLC

**NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Q-no previous project shown that outlines similar reporting needs to OADS.</li><li>2. P-Detailed experience with individual assessment processes.</li><li>3. Q-Not using common assessment tool?</li><li>4. N-projects shared are not similar to this RFP</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. P - plan to provide this report</li><li>2. P- Reports include appropriate timelines</li><li>3. P-provided plan</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. P-There is a plan to provide all reports with associated timelines.</li><li>2. P- Provided plan</li><li>3. P-plan provided</li><li>4. P- Detailed plan provided</li><li>5. P-Provided very detailed plan, Q-department review time?</li><li>6. P- Plan includes 6 step process</li><li>7. P-Plan provided but brief</li><li>8. P-plan includes NDA's and confidentiality agreements</li><li>9.</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. P- highly educated upper management</li><li>b. Q-Small team</li><li>c. N-somewhat vague with regard to all staffing roles.</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. P- The implementation plan fits with OADS needs.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate

**DATE:** 5/15/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Founders 10+ years public sector experience</li><li>• Served several government agencies since 2022 listing several</li><li>• Approach: translate data into action, insight through analytics, pragmatic problem solving and evidence based and strategic alignment</li><li>• Uses variety of sources for decision making such as qualitative stakeholder insights to scientific research resources.</li><li>• Provided examples of governmental experience by personnel. This includes Leslie Huckleberry who served as state unit on aging director in Indiana with experience across LTSS systems</li><li>• Provided three projects including: Indiana Broadband, Indiana Department of health (initiative to bridge gaps in data gathered across divisions), Indiana Homeland Security (support firefighters and emergency responders)</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• Met- does not plan on using subcontractors</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• Met however Maine Engagement team not identified in graphic</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• Met-none</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Met-appears financially viable</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Met- valid/active</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate

**DATE:** 5/15/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

**Part IV, Section III. Proposed Services**

**1. Services to be Provided**

**Part II**

**A. General Requirements**

- Define the problem, state the question, exploratory data analysis, engineering and modeling, analyze and interpret, translate and action
- Engagement for collaboration will include partner with Department, engage with stakeholders (listening sessions), develop roadmap for data collection, est strategic obj
- P: Provides an evidence based approach with examples of each type
- Very throughout explanation of approach to data gathering, analysis and summary
- Will work with Department to define requirements such as source, data fields, formats, data dictionaries, formats.
- Will adhere to security protocols using secure data transfers via SFTP, encryption and compliance standards
- Will work with department on analytical methods and times lines for data analysis and reporting
- Uses data summary protocols with questions, aims, purpose, outcomes and hypotheses
- Develops data analysis plan with various levels of analysis including sensitivity analysis, multivariate.
- Delineate indicates communication approach includes transparency, clarity and preparation.
- Will provide stakeholder activities through meetings materials, various facilitation methods including virtual and in person, tailoring meetings based on audience type.
- P: will prepare all materials in advance for Department review
- will provide documents in plain language and test it using non experts to review
- will prepare documents for 508 compliance
- P: will tailor outputs for specific audiences such as fact sheets, visuals, graphs etc.
- Reports the teams is experiences with Figma, Power BI, Tableau and adobe illustrator
- Bidder will align with Department templates and visual standards
- Validates 508 compliance using software tools and manual testing.
- Bidder provides clear and concise description of how they will keep data secure and confidential. Examples provided: data encryption, transfer encryption, multifactor login, 15 min lock out, data stored on company owned workstations
- Bidder uses data bricks system that has compliance certs and attestations not limited to HIPAA and enhanced security monitoring
- Bidder states that no data is released without discussion and approval from Department.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Delineate

**DATE:** 5/15/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

**B. Required Reports**

- Will prepare 3 LTSS reports as requested.
- Each report will follow a standard framework- developing expectations, gathering and analyzing and matching expectations.
- Each report will include stakeholder feedback via listening sessions, meetings and electronic surveys which will be evaluated and incorporated into report roadmap.
- The roadmap will build upon existing project plan and contain step by step details on data gathering and analysis.
- DD and BI will follow similar process described in LTSS for required reports
- APS State Plan will follow similar process described in LTSS DD/BI. APS reports the bidder recognizes comparative sources to be used in analysis.

**C. Report Development**

- Met- provides GHANT chart for project timeline. Diff to read due to size.
- Met-clear lines communications and documentation of change requests, closed feedback loops with regular progress reports at intervals agreed upon, regular updates to project milestones
- Will define obj and key questions for stakeholders and determine best way to collect data and feedback from stakeholders and key informants such as in person, survey, virtual)
- Provides examples of engagement methods such as work sessions, focus groups, town halls, partnership meetings, community meetings, surveys and feedback channels such as emails or online forms.
- Data analysts will work with Department to identify data points and key findings and incorporate with data visualization.
- Team will recommend data points to be approved by Department
- create metrics and translate into target goals and objectives into measurements and indicators to be managed in logic model
- storytelling approach and data visualization
- Draft report submission within agreed upon for department feedback for revision and resubmission until final approval achieved.
- Met
- Will use ongoing monitoring external sources of data such as CMS, ACL, OAA, CDC, Census, academic resources, AARP etc.

**2. Staffing**

a.-c. Met

**3. Implementation - Work Plan**

a. Met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 05-29-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• Bidder met requirement	
<b>2. Subcontractors</b>	
• No noted use of subcontractors	
<b>3. Project Team Organizational Chart</b>	
• Provided as requested, met requirement	
<b>4. Litigation</b>	
• No litigation disclosed	
<b>5. Financial Viability</b>	
• Provided as requested, met requirement	
<b>6. Certificate of Insurance</b>	
• Provided as requested, met requirement	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 05-29-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Detailed and thorough response provided.</li><li>2. Detailed and thorough response provided.</li><li>3. Detailed and thorough response provided.</li><li>4. Detailed and thorough response provided.</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. Detailed and thorough response provided. Significant SME engagement noted.</li><li>2. Detailed and thorough response provided. Included specific references to statutory requirements.</li><li>3. Detailed and thorough response provided.</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Provided examples of Gantt charts and described prior experience.</li><li>2. Provided as requested, requirement met.</li><li>3. Provided as requested, requirement met.</li><li>4. Response provided did not have the same level of detail as other responses within this bid.</li><li>5. Response provided lacked detail, question not answered.</li><li>6. Response provided lacked detail, question not answered</li><li>7. Requirement met</li><li>8. Response lacked sufficient detail.</li><li>9. Response lacked detail, but provided sufficient detail to meet requirement.</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Details provided gave detailed insight into responsibilities for the specific RFP, but not the organization overall.</li><li>b. No intended use of subcontractors noted.</li><li>c. Provided as requested</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Provided a detailed work plan, requirement met.</li></ol>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Guidehouse, Inc.

**DATE:** 05/15/2015

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Globally experienced with public (federal/state) and private sectors</li><li>• Clients include 300 health systems and 38 pharmaceutical companies</li><li>• Operate Guidehouse Center for Health Insights</li><li>• Primary areas of work include data/analytics</li><li>• Experience with aging and disability service, including prior contract with Maine DHHS/OADS</li><li>• Provided three relevant projects</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• The Bidder does not intend to use subcontractors</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• Organizational chart provided</li><li>• Team includes project director, project manager, and team members with expertise in aging, disability, adult protective services, interviewing, data analysis</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• The Bidder reported no litigation during the past 5 years</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Balance sheets provided for 2022-2024</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Certificate provided dated 4/28/2025</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Guidehouse, Inc.

**DATE:** 05/15/2015

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. The Bidder provided a very detailed plan to exceed expectations, and they include information about data capture/tracking, how they will work with the Department, and all other aspects of the work contained in the RFP</li><li>2. The plan for communication, including facilitation of meetings and stakeholder engagement is provided in detail</li><li>3. Experience with use of Plain Language and compliance with Section 508 is evident in the proposal</li><li>4. The Bidder provided minimal detail about how they will maintain confidentiality</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The Bidder provided extensive detail about their plan to prepare the required Long Term Services and Support reports, including incorporating Older Americans Act State Plan on Aging data</li><li>2. The plan to produce the Developmental Disability and Brain Injury Services reports are described in detail</li><li>3. The Bidder provided extensive detail about producing the Adult Protective Services, and site previous experience assisting other states in this area</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. A detailed description of a work plan example is provided, and the Bidder cites expertise in project management expertise</li><li>2. The Bidder explained how report changes will be managed</li><li>3. The Bidder explains in detail how data will be collected through stakeholder engagement/interviews and documentation</li><li>4. The Bidder explained their experience and expertise with infographics</li><li>5. The Bidder met the requirement</li><li>6. Bidder provided detail on their approach to provide timely summaries of reports and other information, as required</li><li>7. The Bidder met the requirement</li><li>8. The Bidder states they will ensure confidentiality</li><li>9. The Bidder proposes to use (In)Sight Health data warehouse to access available data</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Roles/responsibilities, resumes for the project team are provided</li><li>b. No subcontractors are planned</li><li>c. A staffing plan is provided in detail, with estimated time proposed for each major role</li></ol>
3. Implementation - Work Plan

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Guidehouse, Inc.

**DATE:** 05/15/2015

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

a. A detailed work plan is provided
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<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$1,289,272.19 total fixed costs</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 5/14/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• I: Global consulting group with experience/expertise conducting evaluation for state governments</li><li>• P: Three recent projects described state partnerships with related reporting specific to each of OADS program areas (LTSS, IDD/BI, APS)</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• N/A</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 5/14/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Q: Description of providing research and reporting services is interspersed with examples of previous experience, more information is presented about what has been done with other states. How does these experiences in other states relate to what is proposed for Maine?</li><li>2. P: Proposal states that members of the team are trained in accessibility, which includes personnel focused on Section 508 compliance</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P: LTSS related reporting includes appropriate recommendations for report content with a solid balance of data sources.</li><li>2. P: IDD/BI report descriptions include descriptions of how legislative requirements will be addressed.</li><li>3. I: Bidder cites specific toolkit for APS</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. P: Workplan cites the use of a project management model</li><li>2. P: Proposal offers the option of leveraging a trademarked data warehouse for sourcing publicly available data</li><li>3. P: General process for developing each report is clearly articulated with solid method for developing high-quality evaluations for each program area (LTSS, IDD/BI, APS)</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. P: Proposed project team includes subject matter experts (SME) across LTSS, IDD/BI and APS systems</li><li>b. I: Helpful table included by report topic and SME</li><li>c.</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Meets requirements</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse Inc.

**DATE:** 6/6/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• P-Provided information, Lance Robertson CEO, located in Mclean Virginia	
<b>2. Subcontractors</b>	
• P-none	
<b>3. Project Team Organizational Chart</b>	
• P-provided	
<b>4. Litigation</b>	
• Q-Did not see litigation listed	
<b>5. Financial Viability</b>	
• P-provided	
<b>6. Certificate of Insurance</b>	
• P-provided	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse Inc.

**DATE:** 6/6/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. P-provided plan</li><li>2. P-provided detailed plan referencing plain language, N-no reference to 508 compliance</li><li>3. P-provided info, but brief</li><li>4. P-provided</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. P- Detailed plan</li><li>2. Q-provided plan, but brief</li><li>3. P-provided plan</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. P-provided information</li><li>2. P-This item was placed out of order in their documents</li><li>3. P-Plan provided</li><li>4. P-Plan provided, but brief. Q-Proposes weekly meetings</li><li>5. P-plan provided</li><li>6. N-Plan provided but very basic</li><li>7. N-Proposed sharing Department requested changes only in final draft</li><li>8. Q-Proposed weekly meetings?</li><li>9. P-Provided</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. P-provided listing of involved staff with a listing of their roles, responsibilities and credentials</li><li>b. P-provided</li><li>c. No subcontractors</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. P-provided through Ghant chart</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 5/20/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• 50 locations globally, headquarters in DC.</li><li>• 18000 employees</li><li>• Experience with the following services: strategic planning, program design, rate setting, federal waiver and CMS compliance, Value Based Purchasing and Health Information Technology development</li><li>• Experience with Medicaid FFS, Manage Care, Public Health, Veterans, LTSS ad Medicare</li><li>• Aging and Disability experience includes leaders by former state and federal agency executives and experience with multiple states (AK, AL, FL, KY, OK, NH, NY, ME, RI, SD, TN, WY)</li><li>• Provided list of Projects: OADS program and financial review AALF; AK supported drafting Aging State Plan, nutrition program and oversight APS. In addition, oversaw MFP, DS redesign; Delaware analysis APS, reviewed SOPs; Missouri digital health transformation, OK report in current state of aging including benchmarking and analytical research</li><li>• Three projects reported: AK state plan on aging, Delaware evalu of APS, DSL State plan on aging.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Will not use sub contractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Met- none reported</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 5/20/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1.<ul style="list-style-type: none"><li>State strategy includes:<ul style="list-style-type: none"><li>• detailed tracking system with:<ul style="list-style-type: none"><li>○ legislative requirements, key stakeholders, data sources, timeliness and identifying other data/system gaps.</li></ul></li><li>• Stakeholder involvement</li><li>• Centralized document repository such as Sharepoint</li><li>• Provided relevant experience chart</li><li>• Use of peer research and other state comparative research to identify leading practices for consideration.</li><li>• Once data collected will use advanced statistical and qualitative methods to identify patters, will supplement with interviews and survey data to identify themes</li><li>• Bidder states they will create tracking document for research findings, stakeholder interviews and takeaways</li><li>• Did not address 1a.</li></ul></li><li>2.<ul style="list-style-type: none"><li>• Kick off meeting to align goals and obj with department, will provide regular updates on project progress, milestones and risks, will create a detailed communication plan that includes stakeholder engagement, mapping, listening sessions and surveys.</li><li>• Meetings will be documented and follow up</li></ul></li><li>3. Mislabeled at Requirement 2.<ul style="list-style-type: none"><li>• Ensure compliance by working closely with compliance specialist. Does not provide credentials of specialists.</li><li>• Demonstrates some understanding in application of plan language in approach by: using familiar language, readability formulas, creating accessible documents and testing with assistive technologies such as screen readers to ensure access</li><li>• Will request department approved templates</li><li>• Maintains Visual Communications team dedicated to 508 compliance standards.</li></ul></li><li>4. Mislabeled Requirement 3<ul style="list-style-type: none"><li>• Does not plan to share documents outside Department but if they do they will obtain written request</li></ul></li></ul></li></ol>
B. Required Reports

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 5/20/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

1.

Biennial Summary:

- Will review 2020 census and American Community Survey five year estimates, 2023 rural urban continuum to identify metro versus non metro areas.
- Will do desk review of program and financial reports
- Stakeholder engagement and surveys
- Unclear is provider will request any state level data on utilization from state managed systems

Biennial Comparison of LTSS Residential Characteristics:

- Will do desk review of program and financial reports including licensing requirements
- Stakeholder engagement and surveys
- Peer state research and data analysis and reporting
- Unclear is provider will request any state level data on utilization from state managed systems

4 Year Report on Current Allocation of resources for LTSS:

- Review state plan on aging
- Use census and survey data (American Community Survey and Rural Urban Continuum
- Will conduct review of other documents including HCBS CAHPS, AARP scorecard, AARP study from 2023, United Health Foundations Americas Health Rankings, State Research and Stakeholder engagement

2. met

3. Met.

- IL use of multi voting process for identification of objectives, goals etc.

C. Report Development

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Guidehouse

**DATE:** 5/20/25

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

1. met
2. Final report will include revisions.
3. Met.
4. Analytic findings will be translated into summary tales, briefings and visualizations
  - Framework will be noted by state client
  - Possible use of tableau
5. Will work with Department
6. Provided included element of report such as executive summary, intro, progress, achievements, recommendations and appendices but does not include details about how reports will be written
7. Final report will incorporate state revisions.
8. Only to be disseminated to Department staff.
9. I: will use Insight Health data warehouse to access demographic data quickly

**2. Staffing**

- a. met
- b. met
- c. met

**3. Implementation - Work Plan**

- a. met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 5-29-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Some additional details about the organizations history and structure would have been beneficial, but all critical elements were included.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Identified subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Structure was provided but alignment between people and roles was a bit ambiguous</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>None noted</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Provided</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 5-29-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Thorough description provided.</li><li>2. Thorough description provided.</li><li>3. Structure was provided but names were not clearly aligned with roles.</li><li>4. Exceptionally detailed response provided.</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. Clear detailed description was provided addressing all components.</li><li>2. Clear detailed description was provided addressing all components.</li><li>3. Clear detailed description was provided addressing all components.</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Clear, detailed, and specific plan provided</li><li>2. Detailed information provided</li><li>3. Detailed information provided</li><li>4. Exceptionally clear and detailed response</li><li>5. Clear and detailed response</li><li>6. Exceptionally clear and detailed response</li><li>7. Exceptionally clear and detailed response</li><li>8. Exceptionally clear and detailed response</li><li>9. Exceptionally clear and detailed response</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Structure was provided but names were not clearly aligned with roles.</li><li>b. Detailed plan was presented to manage and work with identified subcontractors</li><li>c. Met requirement</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Detailed plan provided</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 05/19/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Working nationally in area of long term services and supports, primarily with Medicaid Home and Community Based Services (waiver programs)</li><li>• Subcontractor of Alvarez &amp; Marsal's agreement with OADS related to the HCBS access rule</li><li>• The Bidder cites additional work in nursing facility and residential settings; Medicaid eligibility and enrollment, including those dually eligible for Medicaid and Medicare; and aging and disability programs, including adult protective and guardianship services</li><li>• Three projects are provided, demonstrating some relevant work</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• Two subcontractors are listed – focused on expertise in stakeholder engagement and long term services and supports</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• An organizational chart is provided, listing key roles: project director, project manager, and leads for reports, engagement, research, analysis, additional team staff are listed as optional</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• The Bidder lists no litigation during the past five years</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• The Bidder provided financial statements for 2022-2024</li><li>• This is a relatively small company with less than \$500K annual income/expenses</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Provided and includes professional liability – dated 5/2/2025</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 05/19/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. The Bidder will use a customized Utilization-Focused Evaluation process; a detailed response was provided on how they intend to design the research, data collection/analysis, and reporting</li><li>2. A detailed response was provided on how stakeholders will be identified and meetings will be scheduled and facilitated; they will provide a central point of contact for their work; meeting summaries will be maintained and shared with the Department</li><li>3. The Bidder states their intention, understanding and experience with plan language and 508 compliance requirements</li><li>4. The Bidder states their team has an understanding of confidentiality, and will provide training specific to confidentiality requirements pertaining to this work</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The Bidder described in detail their plan for the Long Term Services and Support reports, including the schedule, planning steps, and report content</li><li>2. The same extensive detail is provided for the Developmental Disability and Brain Injury Services required reports</li><li>3. The Bidder met the requirement regarding the Adult Protective Services reports</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. A Gantt chart is provided showing the required details</li><li>2. The Bidder explained their proposed report drafting process and steps to incorporate requested report changes</li><li>3. The Bidder met the requirement</li><li>4. The Bidder cites experience and expertise with infographics and detailed their plan to collaborate and make recommendations for the desired visualizations</li><li>5. The Bidder met the requirement</li><li>6. The Bidder outlined a proposed strategy for providing summaries of progress on goals</li><li>7. The Bidder provided a detailed response on their plan to submit timely reports and make changes, as needed</li><li>8. The Bidder indicates their intent to maintain confidentiality; they nor their subcontractors do not look to publish the findings of this work</li><li>9. The Bidder met the requirement</li></ol>
2. Staffing

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 05/19/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

- |  |
|--|
| <ul style="list-style-type: none"><li>a. Job descriptions are provided</li><li>b. The Bidder outlined their expectations of subcontractors with respect to roles/responsibilities, project oversight, communication and monitoring, and overall compliance with the Department's expectations</li><li>c. A staffing plan is provided</li></ul> |
|--|

<b>3. Implementation - Work Plan</b>
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- |  |
|--|
| <ul style="list-style-type: none"><li>a. The detailed work plan is charted in various report phases, listing key activity, dates, and lead staff</li></ul> |
|--|

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
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- |   |
|---|
| <ul style="list-style-type: none"><li>• \$1,230,000.00 total fixed cost</li></ul> |
|---|



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 5/14/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• I: Consulting firm with national public health policy and research experience</li><li>• P: Direct policy and research experience cited specific to populations served by LTSS</li><li>• P: Three related projects cited related research and report development for both IDD and Older Adults, which included work for two national organizations</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• I: Proposal includes qualifications for Kevin Hancock Consulting and brief description of related projects involving statewide nursing facility analysis and Medicaid due diligence projects</li><li>• I: Proposal includes second subcontractor, Riverstone Health Advisors with a description of previous work. One work example cited includes the development of the Medi-Cal performance dashboard which has been in operations for 10 years</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Meets requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Meets requirement</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 5/14/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
1. P: Cites and describes valid evaluation model for research and report development 2. I: Proposes suggested questions to guide interest-holder sessions 3. P: Proposal also cites the use of universal design principles for report/visual display development
<b>B. Required Reports</b>
1. P: Comprehensive explanation for each report which includes appropriate report content for all program areas (IDD, APS, LTSS)
<b>C. Report Development</b>
1. Q: Unable to locate reference to secure platform expected to be used for collecting survey information?
<b>2. Staffing</b>
a. Q: Proposed project team includes two optional positions (e.g., data analyst) b. P: Each position description includes appropriate minimum qualifications relevant to the core position functions
<b>3. Implementation - Work Plan</b>
a. Meets requirements

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 5/27/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• P- information provided</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Q-Kevin Hancock Consulting, Riverstone Health Advisors?</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• N-not informative</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• P-no litigation</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• P-Provided information</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• P-Provided information</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** 5/27/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. P-Provided information</li><li>2. Q-team members are all independent consultants?</li><li>3. I-Integration of mixed methods approach</li><li>4. I-Iterative process review</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. P-Provided information</li><li>2. P-Experience with reporting to Legislature</li><li>3. Q-stakeholder engagement process</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. P- Provided information</li><li>2. P-Interest holder engagement plan</li><li>3. P- information provided related to timeliness</li><li>4. P-stakeholder engagement</li><li>5. Q-UFE model?</li><li>6. N-Report drafting section seems brief for</li><li>7. Q-Plain language summary?</li><li>8. P-Preparatory 2 week planning session</li><li>9. P-report will Identify Unmet needs</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. P-adequate</li><li>b. Q-Use of Subcontractors who are otherwise independent?</li><li>c. P-highly educated staff</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. P-developed set of strategies</li></ol>
Part IV, Section IV. Cost Proposal and Budget Narrative
<ul style="list-style-type: none"><li>• P-information provided</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** May 22, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Certified by WBENC (woman owned business)</li><li>• Owner spend 10 years as legal services attorney for Penn Health Law Project prior to forming company. Here she focused on Medicaid eligibility, enrollment and access</li><li>• Three projects: Advancing States (technical assistance HCBS Spending plans included surveys, focus groups and results analysis re: success of projects), NASDDS (review of electronic case management system, survey, focus groups and analysis with recommendations) and Aging Our Way (principal architect Aging State Plan for PA).</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• Kevin Hancock- LTSS Subject Matter Expert</li><li>• Riverstone Health Advisors</li><li>• Provided expertise and prior projects for subcontractors but unclear as to their role for this scope of work</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• Provided chart with no identified Names for each role</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• Met-none</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• met</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• met</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** May 22, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

**Part IV, Section III. Proposed Services**

**1. Services to be Provided**

**Part II**

**A. General Requirements**

1. I: will use Utilization Focused Evaluation (UFE)
  - Deploy practical approach, apply programmatic knowledge and leverage national perspective to recognize opportunities for Maine.
  - Reports are confidential and for clients only
  - Will work with department to determine scoping and use department provided de-identified data
  - All research and reporting activities will be organized using project mgt tools and will include kick off meeting, scheduled progress check in meetings, shared work plans and clear points of contact.
  - Data analysis will include descriptive statistics, longitudinal studies, benchmarking and use of national data.
  - I: four core strategies: identification of intended users, mixed methods and real world context, interest holder involvement, flexible and emphasis on timely reporting
  - Detailed description of approach including coordination of activities, data analysis activities, iterative approval process and data security.
2. First identify who will be using report, identify key questions, are their set priorities
  - Engagement planning, central point of contact, meeting schedule and facilitation9 advanced agendas and materials) and data collection
3. Follow federal guidelines, use readability tools and Microsoft editor
  - Will use department approved templates
  - Has accessible tools including adobe acrobat, Microsoft word accessibility checker, WAVE
4. Use secure location with regular back ups
  - Use of NDAs

**B. Required Reports**

1.  
LTSS Report 1:
  - 2 week planning period for kick off and stakeholder identification
  - Data collection and analysis including use of external sources such as HCBS, American community Survey and MaineCare Enrollment files
  - Will review critical incident reporting, APS reporting, satisfaction surveys
  - Present demographic trends, including shifts by county utilization and CMS survey outcomes while identifying emerging challenges, access barriers and recommendations
- LTSS report 2: Residential Characteristics

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Halperin Health Policy Solutions

**DATE:** May 22, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

<ul style="list-style-type: none"><li>• Begin kick off of report cycle 9/25, 1/28 and 1/30</li><li>• Data collection 5 weeks into report development process for up to 3 mos.</li><li>• Identifies possible sources of data collection</li><li>• P: lists potential data elements to be collected and analyzed</li></ul> <p>LTSS Report 3: Resource Allocation</p> <ul style="list-style-type: none"><li>• Kick off 2029 report cycle in June 2028</li><li>• Identifies potential stakeholders and external data sources as well as internal data needing to be collected and analyzed</li><li>• Report data collection will begin within 5 weeks and last 3 mos</li></ul>
<p>2. DD reporting</p> <ul style="list-style-type: none"><li>• Report to be provided 4-6 weeks prior to legislative deadline</li><li>• Identifies external and internal data sources to be used to analyzed</li></ul> <p>3. APS report</p> <ul style="list-style-type: none"><li>• Report to be provided 4-6 weeks prior to legislative deadline</li><li>• Identifies external and internal data sources to be used to analyzed</li></ul>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. met</li><li>2. will work with department to determine report change communication preferences however revisions will be acknowledged in writing and followed up on as needed<ul style="list-style-type: none"><li>• will make requested changes however does not report timeframe for changes but does acknowledge changes will be made until Department approval</li></ul></li><li>3. met</li><li>4. will suggest visuals that an highlight trends, comparisons, simplify complex information and make report more engaging.</li><li>5. Secure data transfers via VPN, cloud drives and encrypted file sharing<ul style="list-style-type: none"><li>• Data sets to be reviewed promptly for completeness and anomalies</li></ul></li><li>6. met</li><li>7. met</li><li>8. reports are for clients only-not bidders to disseminate</li><li>9. at beginning of each reporting cycle they will confirm which new data sets are available and relevant.</li></ol>
<b>2. Staffing</b>
a.-c. met
<b>3. Implementation - Work Plan</b>
a. met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Human Services Research Institute

**DATE:** 5-30-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• Provided a detailed overview of the organization and applicable projects	
<b>2. Subcontractors</b>	
• None noted	
<b>3. Project Team Organizational Chart</b>	
• Provided as requested	
<b>4. Litigation</b>	
• None noted	
<b>5. Financial Viability</b>	
• Provided as requested	
<b>6. Certificate of Insurance</b>	
• Provided as requested	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Human Services Research Institute

**DATE:** 5-30-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. A substantial amount of additional detailed response was provided. The additional detail made it challenging to assess the specific elements of the RFP. However bidder met requirement.</li><li>2. A substantial amount of additional detailed response was provided. The additional detail made it challenging to assess the specific elements of the RFP. However bidder met requirement.</li><li>3. Met requirement</li><li>4. Exceptional response provided</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Necessary details provided regarding this report.</li><li>2. Necessary details provided regarding this report.</li><li>3. Necessary details provided regarding this report.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Provided a detailed workplan as requested</li><li>2. Met requirements</li><li>3. Details necessary to understand the full scope of services in this area were provided in a different portion of the proposal. The details provided in this specific section were not sufficient.</li><li>4. Details necessary to understand the full scope of services in this area were provided in a different portion of the proposal. The details provided in this specific section were not sufficient.</li><li>5. Details necessary to understand the full scope of services in this area were provided in a different portion of the proposal. The details provided in this specific section were not sufficient.</li><li>6. Met requirement</li><li>7. Met requirement</li><li>8. Met requirement</li><li>9. Met requirement</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Provided as requested</li><li>b. None noted</li><li>c. Provided as requested</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. Provided a detailed work plan, as requested.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Human Services Research Institute

**DATE:** 05/20/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Not-for-profit organization, in business for nearly 50 years</li><li>• Experience with government (federal, state, county level) agencies; involved across a span of human services topics, including the population served by OADS</li><li>• The Bidder has past experience with performing services for Maine, and is currently working with OADS to implement a needs assessment tool for individuals utilizing HCBS</li><li>• The Bidder provided a description of a 4-part framework to conduct research, data analysis and data reporting</li><li>• Three relevant projects are provided</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• The Bidder does not intend to use subcontractors to perform the work</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• A project team organizational chart is provided, and includes a project director, project manager, researchers, data analysts, and editor</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• The Bidder indicates no litigation during the past five years</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Independent auditor reports, with balance sheets and income statements, for 2022-2024 are provided</li><li>• No concerns are noted</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• A certificate dated 10/1/2024 is provided, and includes professional liability coverage</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. The Bidder provided a very detailed description on how they propose to complete the work described in the RFP; they focused their response on their experience and expertise with evaluation, data analysis and reporting; they broke out their plan by major tasks – project management; data collection, management and analysis; community outreach and engagement; completion of required reports</li><li>2. Details are included regarding their plan to work with OADS to conduct meetings and outreach with relevant stakeholders to aid in research and data gathering/vetting; stipends will be provided to participants (not acting in professional capacity)</li><li>3. The Bidder met the requirement</li><li>4. The Bidder provided a detailed description on their plan to maintain confidentiality, including use of secured data environments, staff training/testing, and adhering to the Business Associate Agreement with the Department</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. A well-developed response is provided that indicates how the required Long Term Services and Supports reports will be produced accurately and timely</li><li>2. The Bidder met the requirement related to the Developmental Disability and Brain Injury Services reports</li><li>3. The Bidder provided a detailed plan for the Adult Protective Services reports</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. A detailed work plan is provided, noting timelines/legislative deadlines and other relevant details; report development is outlined</li><li>2. Minimal detail is provided about addressing report changes</li><li>3. Minimal detail is provided about facilitating/documenting meetings and other events</li><li>4. The Bidder provided minimal detail on collaborating and determining topics for infographics</li><li>5. The Bidder met the requirement</li><li>6. The Bidder refers to the workplan in response to this section</li><li>7. The Bidder met the requirement</li><li>8. The Bidder provided an understanding and plan to adhere to the requirement</li><li>9. The Bidder explained their understanding and plan to update reports as new data is available</li></ol>
2. Staffing

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

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- |   |
|---|
| <ul style="list-style-type: none"><li>a. Job descriptions are provided for seven key roles</li><li>b. No subcontractors are included in the staffing plan</li><li>c. A detailed staffing plan is included, including a project director experienced with Maine, an experienced project manager, chief data analyst to lead the data analyst team, and three senior associates with expertise in research/policy/evaluation and other relevant areas</li></ul> |
|---|

<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>a. A Gantt chart is provided</li></ul>



<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$1,281,000.00 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** HSRI

**DATE:** 5/15/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• P: In operation for 50 years with a focus on health and human service research</li><li>• P: Three project examples are highly relevant to this contract's scope of work as each relates to a population served by OADS and covers related content (system's analysis)</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Meets requirements</li></ul>	

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**RFP #:** 202503044

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**BIDDER NAME:** HSRI

**DATE:** 5/15/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>1. P: Proposal cites experience with MHDO and potential for additional data sourcing</li><li>2. I: Helpful suggested list of additional publicly available data sources</li><li>3. I: Describes realistic methods for data cleaning</li><li>4. P: Sample visual displays are plain language</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>1. P: Each report contains a helpful and appropriate description of the report content</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>1. P: Community Asset Map a plus</li><li>2. P: Offers to include multi-media deliverables if needed (e.g., video)</li><li>3. P: Detailed description of security protocols in place</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>a. Proposal includes a range of roles expected to participate in a contract like this, ranging from project director, researcher, analyst and report editor.</li><li>b. Each role includes minimum qualifications to be expected related to the role.</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>a. Meets requirements</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Human Services Research Institute

**DATE:** 5/27/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• P- information provided	
<b>2. Subcontractors</b>	
• P-none	
<b>3. Project Team Organizational Chart</b>	
• N-not informative	
<b>4. Litigation</b>	
• P-no litigation	
<b>5. Financial Viability</b>	
• P-Provided information	
<b>6. Certificate of Insurance</b>	
• P-Provided information	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Human Services Research Institute

**DATE:** 5/27/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. P-Provided information</li><li>2. P-familiar agency for OADS</li><li>3. P-history of similar reporting for this and other states</li><li>4. Q-already working w/OADS on a separate project</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. P-Provided information</li><li>2. I-MHDO Data linkage</li><li>3. P-will adjust reports in accordance with OADS</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. P- Provided information</li><li>2. P-plan provided</li><li>3. P- plan provided</li><li>4. N- did not Meet requirement</li><li>5. P-Met requirement</li><li>6. P- Met requirement</li><li>7. P-Reports provided well in advance of Legislative timeline</li><li>8. P-Will adjust reports in accordance with OADS</li><li>9. P-six step reporting process</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. P-adequate</li><li>b. P-Roles of seven staff well articulated</li><li>c. N-Work implementation plan difficult to read</li></ol>
3.
<ol style="list-style-type: none"><li>a. P-Provided information but Timeline shown only on work implementation plan which is very difficult to read.</li></ol>
Part IV, Section IV. Cost Proposal and Budget Narrative
<ul style="list-style-type: none"><li>• P-information provided</li></ul>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Human Services Research Institute - HSRI

**DATE:** May 23, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Nonprofit since 1976</li><li>• Work across several fields including children, child and family welfare, housing, population health, IDD, aging and physical disabilities</li><li>• More than 75 employees</li><li>• Completed projects for 28 federal agencies in 50 states and 100 counties and cities including Maine</li><li>• 3 projects: Maine DHHS (assessment tool for lifespan waiver), NH DHHS (gap analysis NH LTSS system), Utah DHHS (research for recommendations for LTSS with various support needs including IDD, TBI and aging).</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Met- no use of subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• none</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Human Services Research Institute - HSRI

**DATE:** May 23, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

**Part IV, Section III. Proposed Services**

**1. Services to be Provided**

**Part II**

**A. General Requirements**

1. Provides detailed structure of Tasks for each phase
  - Includes: possible sources of external data sources including OAA state plans, HCBS CAHPS Surveys, NCI, Health and Retirement Study, American Community Survey and National Health and Aging trends
  - Uses 6 step reporting process across all deliverables. Table includes descriptive and activities and expected outcome
2. Communication approach includes asset mapping, outreach engagement, vetting and validation and maintenance of communications plan with accessibility (508 compliance)
3.
  - since 1976 HSRI has provided policymakers, legislators and services users family members and other interested parties with high quality information in multiple formats
  - indicates all deliverables will fully comply with Sec 508 Reb Act of 1973 and revised Sec 508 effective March 2017
  - all reports will be prepared using department approved templates
4. secure cloud-based environment built on MS Azure Zero Trust Architecture which adheres to CIS, NIST and CSA monitored 24/7
  - competency based training and testing in areas of HIPAA, PHI
  - execution of BAA
  - before releasing any information, will use written request to be submitted and approved by Department

**B. Required Reports**

1. Acknowledgement of required LTSS reports and reporting cycle dates however for the LTSS Biennial report- did not provide a lot of detail regarding types of data sources and sets to be used.
  - For residential report will use insights from Nursing Home and Residential Care Facility Advisory Council
  - Bidder notes the 2030 report falls outside current contract period but will prepare a report planning document to support future work
  - LTSS 4 year report: will use data from OAA state Plan and QARC input. Notes this report is outside contract period ending 2027 but will develop document to guide future prep.
2.
  - DD Biennial Plan: acknowledgement

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

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**DATE:** May 23, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

3. APS report acknowledgement including dates due.

**C. Report Development**

1. met
2. met
3. in person meetings for data collection such as a focus group. Will meet people where they are which includes travel to service settings
4. provided example of report outline and components.
5. Will establish BAA and data use agreements.
  - Will provide table shells for the structure before transmission
6. Minimal response. Will use work plan and deliver to OADS by the 15<sup>th</sup> of the following month.
7. States the review process and that they will incorporate department revisions.
8. Will adhere to contractual obligations re: release of data and findings.
  - Will get department approval before dissemination
  - Regular meetings with oads to review status of analysis and reporting and confirmation of timelines for reporting.
9. Will refresh as available and appropriate

**2. Staffing**

a.-c. met

**3. Implementation - Work Plan**

a. met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** LW Consulting, Inc.

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Provided detailed information about the company. Project examples provided lacked a robust connection to the activities outlined in RFP.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• None noted</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Detailed chart provided</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• None noted</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Provided as requested</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Provided as requested</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** LW Consulting, Inc.

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Bidder addressed the RFP requirement, but lacked sufficient detail.</li><li>2. Met the requirement</li><li>3. Bidder addressed the RFP requirement, but lacked sufficient detail.</li><li>4. Met the requirement.</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The response lacked a lot of specific detail about how the proposed plan would be implemented.</li><li>2. The response lacked a lot of specific detail about how the proposed plan would be implemented.</li><li>3. The response lacked a lot of specific detail about how the proposed plan would be implemented.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Provided a timeline; however, it does not appear to accommodate legislative timelines.</li><li>2. Sufficient response provided</li><li>3. Insufficient detail provided, requirement not met.</li><li>4. Insufficient detail provided, requirement not met.</li><li>5. Insufficient detail provided, requirement not met.</li><li>6. Insufficient detail provided, requirement not met.</li><li>7. Met requirement</li><li>8. Met requirement</li><li>9. Insufficient detail provided, requirement not met.</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Provided as requested</li><li>b. Robust subcontractor management plan noted</li><li>c. Provided as requested</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. Provided as requested, but lacked sufficient detail.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** LW Consulting, Inc.

**DATE:** 05/20/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• The organization is based in PA; their CEO is from Maine and was selected as a Top 50 Women We Admire of Maine in 2024</li><li>• 20 years of consulting experience – highlighted as healthcare compliance and operations</li><li>• The organization is an Independent Review Organization for the federal Office of the Inspector General – work is related to compliance audits, billing and coding</li><li>• Three projects are provided, two detailing work in compliance areas, and the other related to operational practices</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• No subcontractors are planned for this work</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• An organizational chart is provided, and identifies 8 team members for the RFP work</li><li>• Team members include the CEO/CCO, Director HP, Information Services/Security Officer, consulting, marketing, and administrative staff</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• The Bidder lists no litigation during the past five years</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Balance sheet, profit/loss documents are provided for 2022-2024</li><li>• Assets trending down</li><li>• Net loss for 2023 and 2024; cumulative loss of ≈\$350,000 over past 3 years</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Certificate dated 3/27/2027 is provided</li><li>• Professional liability coverage is not noted</li></ul>

# STATE OF MAINE INDIVIDUAL EVALUATION NOTES

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** LW Consulting, Inc.

**DATE:** 05/20/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
1. Use of project management software, Monday.com; minimal information is provided on how the research, data analysis and reporting will be performed
2. The Bidder explains their understanding and intent related to the communication requirements
3. The Bidder states their plan is to use templates provided by the Department; and they state their understanding and experience related to plain language and Section 508 compliance
4. The Bidder outlines their plan related to maintaining confidentiality, including access control and secure data storage
<b>B. Required Reports</b>
1. The Bidder details their plan to produce the required reports for Long Term Services and Supports
2. The Bidder details their plan to produce the required reports for Development Disability and Brain Injury Services
3. The Bidder details their plan to produce the required reports for Adult Protective Services
<b>C. Report Development</b>
1. A Gantt chart and other tables are provided
2. The Bidder provided minimal details on incorporating report changes – use of version control software and setting turn-around times
3. Minimal details are provided by the Bidder
4. The Bidder states the intent of meeting the requirement; minimal details are provided
5. The Bidder states the intent of meeting the requirement; minimal details are provided – use of secure transfer; use of data analysis and visualization software; timeframes will be set
6. The Bidder states the intent of meeting the requirement; minimal details are provided – a standard template will be used; the director will work closely with the team
7. The Bidder states the intent of meeting the requirement; minimal details are provided – comments refer mainly to setting timeframes
8. The Bidder states the intent of meeting the requirement; minimal details are provided – use of non-disclosure agreements and use of encryption
9. The Bidder states the intent of meeting the requirement; minimal details are provided, i.e. references to monthly check-ins and quarterly review
<b>2. Staffing</b>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

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**DATE:** 05/20/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

a. Job descriptions are provided; the positions are not completely consistent with the project team organizational chart; the program manager position is vacant; a subcontractor is listed for statistician role
b. The Bidder describes in detail how subcontractors will be managed, however the Bidder previously responded that they don't intend to use subcontractors
c. A plan is provided; includes use of subcontractors
<b>3. Implementation - Work Plan</b>
a. A work plan is provided

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$1,320,354.74 total fixed cost</li></ul>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** LW Consulting

**DATE:** 5/20/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• I: Organization's history states that organization has been in operation since 2005 and has offered consulting services for a variety of healthcare settings (e.g., nursing homes, rehab)</li><li>• N: Much of the organization's cited experience is related to compliance, auditing, or consulting. Unable to locate examples of past experience that involve research and reporting for state agencies with legislative reporting requirements.</li><li>• N: Two of the three projects cited as related experience were quality assurance or compliance-oriented focus on healthcare service delivery. The third project highlighted primarily project management tasks with a reference to assisting with related reports.</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• N/A</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• N/A</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Q: General Liability information provided, unable to locate professional liability?</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

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**BIDDER NAME:** LW Consulting

**DATE:** 5/20/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. I: Cites software for coordination of report development</li><li>2. P: Describes several relevant data sources for report inclusion (e.g., CMS MDS,</li><li>3. N: Research methodology states a subcontracted statistician will be used, but there is no mention of a subcontractor in the Organization Qualification and Experience section of this proposal.</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P: Many of the examples provided for LTSS reports were highly appropriate</li><li>2. N: Reference to efficiency review for DD annual report seems unrelated to the report's purpose. Description also switches from efficiency to efficacy.</li><li>3. Q: Unclear what the use of modern data tools has to do with summarizing this data in the APS annual report</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. N: Milestone chart provided does not propose a logical report development order and suggests different tasks for each program area. Tasks and order of completion should be similar across programs.</li><li>2. P: Cites the use of additional software for the development of infographics</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Q: What appears to be a critical role in the project (i.e., program manager) was described as an open position</li><li>b. N: Only 1 subject matter expert described, and expertise is specific to nursing facilities and long-term care facilities. No additional information is provided as to expertise in home and community services or adult protective services.</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. N- unclear why it is proposed to complete a trend analysis after a report draft is submitted. In addition, the description above the table suggests this order will be followed for each report, but the chart has a milestone specific to APS.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** LW Consulting

**DATE:** 6/3/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Service

\*\*\*\*\*

**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• P-in business since 2005	
<b>2. Subcontractors</b>	
• P-None	
<b>3. Project Team Organizational Chart</b>	
• P-provided	
<b>4. Litigation</b>	
• P-none	
<b>5. Financial Viability</b>	
• P-seems viable	
<b>6. Certificate of Insurance</b>	
• Q-no professional liability listed	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** LW Consulting

**DATE:** 6/3/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Service

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P-provided</li><li>2. Q-communication w/all stakeholders via email?</li><li>3. P-plain language writing</li><li>4. P-detailed plan</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P-plan provided, somewhat vague</li><li>2. P-plan provided</li><li>3. P-plan provided</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. P-ghant chart provided</li><li>2. P-plan provided</li><li>3. P-town halls, webinars, stakeholder focus groups</li><li>4. P-plan provided</li><li>5. N-data liaison?</li><li>6. Q-Department's logic model?</li><li>7. Q-Final draft two-weeks before legislative due date?</li><li>8. P-N.D.A.'s</li><li>9. P-plan provided</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. P-plan provided with one staff vacant</li><li>b. N-mention of Subcontractors</li><li>c. P-provided information</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. N- mentions subcontractors again</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** LW Consulting

**DATE:** May 29, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Specializes in healthcare compliance and operational consulting</li><li>• In operation sine 2005</li><li>• Experience seems to be more facility based such as hospitals and nursing homes and related to compliance and merger and acquisition</li><li>• Staff listed have clinical credentialing and do not appears to be in the data analytics space</li><li>• Provided some project experience in addition to three required projects however each project their role was mainly described as the Independent Review Organization to provide compliance assessments and auditing to discover areas for improvement in clinical settings</li><li>• Three projects: 1. Revivie Health Senior Care Management. Project was focused on operational and clinical consulting to improve facility ratings. 2. Centerstone. Compliance focused review of policy and procedures including interviews of staff and leadership to complete compliance gap analysis. 3. IPRO. Project scope described was limited to facilitation support.</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• Met. none</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• Met.</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• Met. None.</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Met. Provided 22, 23, 24</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Met. Included auto, commercial general and workers comp</li></ul>

**STATE OF MAINE  
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**RFP #:** 202503044

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**DATE:** May 29, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Uses and is proficient in Monday.com for project management<ul style="list-style-type: none"><li>• Subject matter experts have 40 years experience in the industry dedicated to compliance and quality improvement and education.</li><li>• States they will provide research, data analysis and reporting in plain language adhering to confidentiality.</li><li>• Bidder states they will review and analyze Department provided de identified data and supplemental data such as CDC, CMS, ACL, industry reports, state level data etc</li></ul></li><li>2. Will schedule and facilitate with Department and Stakeholders using teams/zoom virtual platforms<ul style="list-style-type: none"><li>• Meetings will be documented and materials sent in advance</li><li>• Proposes bi weekly meetings and reevaluation of frequency every six months</li></ul></li><li>3. Acknowledges 508 requirements and plain language. Will use tools such as adobe, wave, Microsoft accessibility checker</li><li>4. Will maintain confidentiality via access control, non confidentiality statements and approvals</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. <b>Biennial LTSS:</b><ul style="list-style-type: none"><li>• Bidder states they will collect data from multiple sources, do capacity analysis of service availability by service by county, workforce and utilization. Will use data trends to identify future needs and incorporate stakeholder input for reporting which will ne accessible.</li><li>• Bidder provides minimal detail but reiterates requirements as their description of work.</li></ul> <b>LTSS Residential Setting report:</b><ul style="list-style-type: none"><li>• Will review licensing Medicaid reimbursement and inspection records to create dataset. Then will use this data to compare key characteristics (staffing, capacity, demographics) to identify benchmarks and trends</li></ul> <b>4 Year LTSS Allocation Report</b><ul style="list-style-type: none"><li>• States they will complete resource mapping to analyze allocation of state and federal funds for LTSS but with minimal detail as to what this entails or how</li></ul></li></ol>

**STATE OF MAINE  
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**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

**2. DD reports:**

- Minimal response. Bidder acknowledges reports and provides some details as to data sources to be used but with minimal detail as to how
- Bidder does indicate coordination with NCI

**3. APS Reports**

- Minimal response. Bidder acknowledges reports and provides some details as to data sources to be used but with minimal detail as to how
- Bidder does acknowledge coordination with requirements of OAA.

**C. Report Development**

1. met
2. Met. Provider will use version control practices and anticipates 3 day turnaround on minimal revisions, 5-7 for substantive.
3. Will use program specialist to schedule and facilitate all meetings.
  - 5 public engagement events in the year of project
  - Documentation of meetings via recordings and scribe will be provided within 5 business days of event.
4. I: Bidder will facilitate 2-3 co-design sessions with Department using staff interactive tools to identify key data insights
  - Bidder will suggest indicators and will design infographics using canva and adobe illustrator
5. will work with Department data liaison to obtain data sets via secure transfer
6. minimal response with little detail in description
7. will provide final draft for approval 2 weeks prior to legislative deadlines. Any changes will be incorporated within 3 business days.
8. Staff will sign NDAs and data shared via secure platform only
9. Will facilitate monthly check ins to identify new data. All data updates will be made quarterly and logged for review. Refresh timelines will be built into work plan to align with submission schedules.

**2. Staffing**

- a. met
- b. Met but unclear if provider will use subcontractors
- c. met

**3. Implementation - Work Plan**

- a. met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** National Opinion Research Center (NORC)

**DATE:** 6-1-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• Detailed description of organization and three robust example projects.	
<b>2. Subcontractors</b>	
• None proposed	
<b>3. Project Team Organizational Chart</b>	
• Provided as requested	
<b>4. Litigation</b>	
• Information provided, litigation noted.	
<b>5. Financial Viability</b>	
• Provided as requested	
<b>6. Certificate of Insurance</b>	
• Provided as requested	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** National Opinion Research Center (NORC)

**DATE:** 6-1-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Response outlined examples of expertise and capacity but lacked logistical implementation details.</li><li>2. Detailed description provided.</li><li>3. Exceptionally detailed response provided.</li><li>4. Exceptionally detailed response provided. Noted return of data if required/requested.</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Exceptionally detailed response provided.</li><li>2. Exceptionally detailed response provided.</li><li>3. Exceptionally detailed response provided.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Thorough and comprehensive timeline provided</li><li>2. Detailed response provided.</li><li>3. Exceptionally detailed response provided. Well aligned with all proposed elements in the RFP response.</li><li>4. Detailed response provided.</li><li>5. Exceptionally detailed response.</li><li>6. The bidder provided a sufficient response, but the details are lacking when compared to other responses provided.</li><li>7. Sufficient response provided</li><li>8. Detailed response provided.</li><li>9. The bidder provided a sufficient response, but the details are lacking when compared to other responses provided.</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Detailed response provided as requested.</li><li>b. None noted</li><li>c. Detailed response provided as requested.</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. Detailed response provided as requested.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** National Opinion Research Center

**DATE:** 05/27/2027

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• The Bidder is an independent research institute, founded in 1941</li><li>• Affiliated with the University of Chicago</li><li>• They have experience providing research and data analytics support to public (federal and state) and private entities</li><li>• The Bidder cites performing data analytics, data management, survey administration, and extensive experience collecting and analyzing data on varied topics in health and human services</li><li>• They provided specific examples of relevant work, including having performed work for Maine state agencies and providers</li><li>• Three projects are provided</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• No subcontractors are planned for this work</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• A chart is provided, indicating a team of 8 – project director, project manager, technical leads and research supports for each program area, and a quantitative advisor</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• The Bidder indicates one litigation related to a complaint under the Equal Employment Opportunity, which is currently in process</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Financial Statements and Report of Independent Certified Public Accountants for 2020, 2021, 2022 and 2023</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• A certificate dated 1/17/2025 is provided; professional liability coverage is not noted</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** National Opinion Research Center

**DATE:** 05/27/2027

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
1. The Bidder stated their experience and use of staff expertise in performing similar work; they detailed their planned approach, including tailoring data collections and analysis for each report, developing a comprehensive work plan, and conducting a landscape analysis
2. The Bidder described their plan in detail, including holding regular meetings, developing agendas and other materials, work with the Department on “calls for information”
3. The Bidder expressed knowledge, understanding, and experience with plain language (emphasizing the use of visualizations) and 508 compliance
4. The Bidder met the requirement for ensuring and providing confidentiality
<b>B. Required Reports</b>
1. A strategy for providing the required long term services and supports reports is provided in great detail
2. The Bidder provided a very detailed plan for providing the required developmental disability and brain injury services reports
3. The approach for the adult protective services reports is very detailed as well
<b>C. Report Development</b>
1. A chart is provided indicating an understanding of report deadlines, tasks, task owners, and task deadlines
2. The requirement is met
3. The Bidder provided a detailed chart of their approach to collecting data, and extensive detail about stakeholder engagement
4. The requirement is met
5. The Bidder provided a very detailed response on their plan to obtain/secure data, and their analytic approaches in performing the required work
6. The requirement is met
7. The Bidder met the requirement
8. The Bidder explained their plan to ensure no reports or finds are disseminated; they stated an understanding of confidentiality requirements
9. The requirement is met
<b>2. Staffing</b>
a. Job descriptions and qualifications for the project team are provided
b. No subcontractors will be used
c. A staffing plan is provided with the requested details

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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**DATE:** 05/27/2027

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>3. Implementation - Work Plan</b>
a. A Gantt chart is provided with the required details

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$1,099,809.86 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** National Opinion Research Center

**DATE:** 5/29/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• I: Founded in 1941 and is affiliated with the University of Chicago</li><li>• P: Has many years of experience conducting policy related research for State and Federal agencies</li><li>• P: Provided a description for three previous projects that are relevant to this RFP (APS related, HCBS related)</li><li>• Q: Unable to determine if the three project descriptions also included the older adult population? Though organization overview also cites experience with this population.</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• N/A</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• P: Organizational Chart includes three distinct personnel roles with program area expertise (APS, LTSS, IDD/BI)</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• Q: One open complaint with the EEOC, outcome is unknown</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Q: Submitted records for 2021, 2022, 2023</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Q: Certificate submitted, unable to locate professional liability</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

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**BIDDER NAME:** National Opinion Research Center

**DATE:** 5/29/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS OADS

<b>Part IV, Section III. Proposed Services</b>	
<b>1. Services to be Provided</b>	
<b>Part II</b>	
<b>A. General Requirements</b>	
<ol style="list-style-type: none"> <li>1. Q: General requirements provide a well-researched suggested list of appropriate data sources based on Medicaid programs servicing older adults, however, minimal references to data sources for APS and IDD?</li> <li>2. Communication and Interested Party Engagement proposal meets requirements.</li> <li>3. P: Highly detailed plan for developing plain language contents and fully 508 compliant</li> <li>4. P: Cites several appropriate controls for maintaining confidentiality</li> </ol>	
<b>B. Required Reports</b>	
<ol style="list-style-type: none"> <li>1. P: LTSS- provides an excellent report outline in a table format listing major content and data sources</li> <li>2. P: IDD- report outline indicates that appropriate data sets for this population is well researched</li> <li>3. P: APS report outline includes helpful suggestions under approach regarding use of existing data/reports to inform program improvement</li> </ol>	
<b>C. Report Development</b>	
<ol style="list-style-type: none"> <li>1. P: Report changes process includes appropriate process steps (e.g., outline, draft, feedback, etc.)</li> <li>2. Met requirements</li> <li>3. P: Partner engagement description includes a well-planned, multi-pronged approach that is tailored to each report.</li> <li>4. P: Offers story-board approach for collaboration</li> <li>5. P: Highly detailed account of process for obtaining data while complying with security and confidentiality requirements</li> <li>6. Met requirements</li> </ol>	
<b>2. Staffing</b>	
<ol style="list-style-type: none"> <li>a. P: Proposed staffing plans includes a strong combination of SMEs, project management and data analytics.</li> <li>b. N/A</li> <li>c. Met requirements</li> </ol>	
<b>3. Implementation - Work Plan</b>	
<ol style="list-style-type: none"> <li>a. Met requirements</li> </ol>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** National Opinion Research Center

**DATE:** 6/6/25

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• P-provided	
<b>2. Subcontractors</b>	
• ? could not find info	
<b>3. Project Team Organizational Chart</b>	
• ?could not find info	
<b>4. Litigation</b>	
• ?-Could not find info	
<b>5. Financial Viability</b>	
• Same as above	
<b>6. Certificate of Insurance</b>	
• Same as above	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

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**BIDDER NAME:** National Opinion Research Center

**DATE:** 6/6/25

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P-info provided, experience with similar projects</li><li>2. P-plan includes meeting with Advisory councils</li><li>3. P-detailed plan including use of VizStudio for data visualization</li><li>4. P-reference to data use agreements</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P-provided detailed plan which includes reference to Maine as “Oldest state in nation”</li><li>2. P-provided information</li><li>3. P-met requirement</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. P-provided information including Ghant Chart</li><li>2. P-provided but brief</li><li>3. Q-all data captured via Zoom?</li><li>4. P-provided</li><li>5. P-use of data exchange portal</li><li>6. P-information provided</li><li>7. P-provided but brief</li><li>8. P-confidentiality forms</li><li>9. P-information provided</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. P-provided information</li><li>b. P-no subcontractors used</li><li>c. P-provided</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. P-provided but brief</li></ol>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** National Opinion Research Center

**DATE:** June 2, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Founded in 1941 independent research institute</li><li>• Collaborates with foreign governments, academic partners, federal and state entities</li><li>• Expertise in Medicaid aging IDD, HCBS and BI</li><li>• Provides examples of projects regarding analysis in cost drivers, evaluation of HCBS assessment process and improving rural health delivery in addition to 3 relevant projects.</li><li>• Currently works with Maine (Since 2012) Maine Health Data Organization and developed comparemaine.org</li><li>• Three relevant projects: 1. National association of Adult Protective Services which included survey and policy analysis resulting in program recommendations. 2. Minnesota DHS HCBS Assessment Process which included significant community engagement. 3. Oregon Health Authority. Evaluation of ARPA Funding.</li><li>• Projects listed above have relevant component but lack large data analysis examples required of this contract.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Met. none</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met.</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Complaint under the Equal Employment Opportunity Commission ( in progress).</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met. Provided audits from 20, 21, 22, 23</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met. Includes commercial gen liability, workers comp and auto</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** National Opinion Research Center

**DATE:** June 2, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1.<ul style="list-style-type: none"><li>• Bidder provides examples of Medicaid policy work in multiple states particularly in the areas of HCBS.</li><li>• Partners with subject matter experts for HCBS, LTSS, aging and disability</li><li>• Provided targeted evaluation supports for states in aging and disability areas including BI, DD and APS</li><li>• Bidder states that each report with be assigned technical lead to identify goals, objectives and strategies as well as to identify data sources to support initiative</li><li>• Provides examples of likely primary and secondary data sources including Medicaid claims, MDS, publicly available data and stakeholder data</li></ul></li><li>2.<ul style="list-style-type: none"><li>• identifies primary points of communication contact</li><li>• communication will include email virtual and shared resource platforms</li><li>• recommends biweekly meetings with department with ad hoc workstream meetings as needed</li><li>• will create agendas and meeting materials in advance</li><li>• meetings notes, key decisions and action items will be recorded</li><li>• will conduct “Calls for Information”</li></ul></li><li>3.<ul style="list-style-type: none"><li>• recognizes potential audiences for report distribution</li><li>• Will provide reports in plain language</li><li>• Provides example of previous report showing easy to read charts and graphs</li><li>• State that all reports will meet 508 compliance</li><li>• Will use NORCs VIZ Studio for data visualization and information design</li></ul></li><li>4.<ul style="list-style-type: none"><li>• bidder states they will follow NORCs institutional confidentiality protection protocol and includes detailed description</li></ul></li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Bidder provided evidence of understanding of LTSS services in way of cited research and statistics using both state published research and national research.<ul style="list-style-type: none"><li>• Provides detail description of understanding of report, possible data sources with identified approach</li></ul></li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** National Opinion Research Center

**DATE:** June 2, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

2. Bidder provided evidence of understanding of DS services in way of cited research and statistics using both state published research and national research.
  - Provides detail description of understanding of report, possible data sources with identified approach
3. Bidder provided evidence of understanding of APS services in way of cited research and statistics using both state published research and national research.
  - Provides detail description of understanding of report, possible data sources with identified approach

**C. Report Development**

1. Provides detailed summary of report tasks, owners and due dates. Including legislative deadlines. Provides Gantt for initial project period
2. met
3. provides detailed table on approaches to gathering input which includes approach description, possible participants and the type of information expected to be gathered.
  - Approaches include but not limited to: survey, key informant interviews, focus groups, listening sessions.
4. met
5. Bidder mentioned requesting MaineCare data and encounter data from Maine Health Data Organization and will include all necessary steps for all agreements and DUAs. Bidder will obtain data via secure file transfer or work with data in NORC Data Enclave
  - States they have used a dedicated data exchange portal for secure transmission of data
6. Provides detail to what types of summaries will be provided to the Department by timeline identified
7. met
8. met
9. describes this as iterative process. Will conduct comprehensive assessment of data sources and frequency of updates and manage as it becomes available via project tracking.

**2. Staffing**

- a. met
- b. met. n/a
- c. met

**3. Implementation - Work Plan**

- a. met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions Counseling

**DATE:** 6-1-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Did not provide a detailed history of the agency. Example projects highlighted alignment with asks of RFP.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Noted a variety of subcontractors who will serve as SME in their technical working group.</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>None noted</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions Counseling

**DATE:** 6-1-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Detailed description provided.</li><li>2. Detailed description provided.</li><li>3. Detailed description provided. Awareness of the audience in crafting reports is noted.</li><li>4. Exceptional response provided</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Detailed Description Provided. Additional details around the logistics of implementation were absent.</li><li>2. Detailed Description Provided. Additional details around the logistics of implementation were absent.</li><li>3. Detailed Description Provided. Additional details around the logistics of implementation were absent.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Provided as requested</li><li>2. Detailed response provided. Department priorities, iterative workflow, and multiple layers of review all noted as key elements in the proposed approach.</li><li>3. A detailed response was described</li><li>4. Additional details around the logistics of implementation were absent.</li><li>5. Sufficiently detailed response provided.</li><li>6. Detailed response provided.</li><li>7. Detailed response provided</li><li>8. Detailed response provided</li><li>9. Detailed response provided</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Details were provided about the qualifications and project responsibilities, but global job descriptions were absent.</li><li>b. Noted use of subcontractors. Minimal engagement and management information for these relationships lacked sufficient detail.</li><li>c. Sufficient staffing plan provided.</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. Detailed work plan provided.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** New Editions Consulting

**DATE:** 05/20/2025; 05/27/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• The Bidder states proven ability to perform the requirements of the RFP, including experience performing large, complicated research projects</li><li>• They plan to partner with organizations and expert/national consultants</li><li>• Three relevant projects are provided</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Six subcontracts are listed: Advancing States, National Association of State Head Injury Administrators, National Association of State Directors of Developmental Disabilities Services, National Council on Independent Living, Disabled Persons Protection Commission, and USAging</li><li>• Contractors will be used as subject matter experts</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Six project team members are listed (in addition to subcontracted SMEs), including the organization president/vice president, project director, project manager/researcher, data analyst/programmer, and production coordinator/508 compliance</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• The Bidder lists no litigation during the past five years</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Balance sheet/profit and loss statements are provided for 2022-2024; additionally an Independent Accountant's Compilation Report is provided for 2022 and 2023</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• A certificate dated 4/30/2025 is provided; professional liability coverage is not noted</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** New Editions Consulting

**DATE:** 05/20/2025; 05/27/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
<ol style="list-style-type: none"><li>1. The Bidder refers to experience and expertise; use of proven models and best practices; a detailed description of their intended staged process is provided, including data inventory and planning, research, data analysis, and reporting; national insights into aging and disability is cited</li><li>2. The Bidder includes a detailed plan to work with the Department and engage stakeholder; an example of prior work to engage stakeholders and the public on a national level is cited</li><li>3. The Bidder states knowledge, understanding and experience with plain language and 508 compliance</li><li>4. The Bidder will meet this requirement through adherence of contract requirements as it pertains to confidentiality; ensure data security with access control and sharing data through secure electronic transfer; and follow Department requirements for releasing information</li></ol>	
B. Required Reports	
<ol style="list-style-type: none"><li>1. The Bidder provided a detailed description of their approach to competing the required LTSS reports – including the use of federal aging and disability expertise and organizational past performance (service population projection estimates, budgetary projections, and other)</li><li>2. The Bidder expressed an understanding of the required reports for developmental disability and brain injury services; they cite 25+ years of experience doing similar work for the National Institute on Disability, Independent Living, and Rehabilitation Research including producing annual reports, infographics, data and evaluation products, and facilitating stakeholder meetings</li><li>3. The requirement is met; the Bidder cites extensive experience with adult protective services and a through understanding of the required reports in the RFP</li></ol>	
C. Report Development	
<ol style="list-style-type: none"><li>1. A detailed work plan for producing all required reports timely is provided</li><li>2. A detailed response is provided that explains how report changes will be made</li><li>3. The Bidder provided a detailed response</li><li>4. The requirement is met</li><li>5. The Bidder states an understanding and intent to obtain datasets and meet required timelines</li><li>6. The Bidder provided a detailed response</li><li>7. The requirement is met</li></ol>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** New Editions Consulting

**DATE:** 05/20/2025; 05/27/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

- |   |
|---|
| <p>8. The Bidder describes the steps they will take to ensure information is not disseminated, including secure storage and sharing, access controls, and use of non-disclosure agreement, if needed</p> <p>9. The requirement is met</p> |
|---|

<b>2. Staffing</b>
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- |  |
|--|
| <p>a. Duties and responsibilities of team members are detailed; job descriptions are provided; team includes a project director/senior researcher, project manager/senior researcher, data analysts, programmer, technical writers, production experts, and consultants (subject matter experts)</p> <p>b. The requirement is met</p> <p>c. A detailed staffing plan is provided with #s of hours for each team member/SME consultants</p> |
|--|

<b>3. Implementation - Work Plan</b>
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| <p>a. A detailed work plan is provided; notably a Gantt chart for each report is provided</p> |
|---|

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
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- |   |
|---|
| <ul style="list-style-type: none"><li>• \$994,219.15 total fixed cost</li></ul> |
|---|



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions Consulting

**DATE:** 5/20/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• P: Organization has direct experience completing multi-year legislative reports</li><li>• P: All three projects cited are directly relevant to each of OADS populations (e.g., Aging, Disability and Protective Services)</li><li>• I: One project includes direct technical assistance and reporting related activities for CMS that is specific to HCBS.</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• P: Proposal includes work with subcontractors from several national organizations directly relevant to OADS programs</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• P: Proposes technical working group with SMEs from nationally recognized organizations</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• Not applicable</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Met requirements</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Met requirements</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions Consulting

**DATE:** 5/20/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P: Clearly articulated process to report development which begins with data inventory and collection, followed by drafting and editing</li><li>2. P: Proposal provides example to support the claim that the agency is a national leader in 508 compliance</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P: LTSS- suggested report content is relevant</li><li>2. Q: Advantage section is notable, however, it is unclear how those ACL experiences will contribute to Maine's specific reporting needs?</li><li>3. P: IDD reporting cites nothing about us without us approach</li><li>4. I: APS report also suggests leverage data from other program areas (e.g., State Plan on Aging)</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. I: Robust explanation of how report changes will be addressed</li><li>2. P: Solid description of approach to collecting feedback and engaging with interested parties, which include the possibility of sessions at Maine conferences.</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. P: Proposes a project team comprised of highly qualified professionals in a range of appropriate positions</li><li>b. P: Staffing plan also includes allocation of staff time by report and personnel</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. P: Well-organized plan with realistic milestones</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions Consulting Inc

**DATE:** 06/05/25

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>N-no business start date</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Q- Multiple Nationaly based entities providing subcontracting, including; Advancing States, NASHIA,NASDDDS,NCIL,DPPC, and Us Aging?</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>P-provided</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>None</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>P-information provided</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>P-provided but Professional liability not shown</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions Consulting Inc

**DATE:** 06/05/25

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. P-provided in depth plan</li><li>2. P- client outcomes study shows capacity for interest holder engagement</li><li>3. P- met requirement</li><li>4. Q-information provided with notable repeat of robust security protocols statement</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. P-information provided but somewhat brief</li><li>2. Q-cites decades of developmental disability-when did they start?</li><li>3. P-Information provided</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. P-information provided including gphant chart</li><li>2. P-multi stage review and iterative refinement</li><li>3. N-gathering/conferences not appropriate locations for upper level discussions</li><li>4. P—requirement met but brief</li><li>5. P-information provided</li><li>6. P-provided</li><li>7. P-meets requirement</li><li>8. P-Need to know basic access, N.D.A.,s</li><li>9. P-information provided</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. P-Adequate</li><li>b. Q-management structure incorporates Subcontractor use for most activities</li><li>c. P-provided</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. P-detailed plan provided for each report</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions

**DATE:** June 2, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Reported history of performance with ACL, OPE and Office of Special Education Programs as well as National Institute on Disability and Independent Living</li><li>• Stated experience with reporting for underserved population including DD and Older Adults</li><li>• Three projects: 1. ACL 2017-2022 citing various large projects within contact including survey conduction, stakeholder engagement, data analysis, technical assistance and report completion. 2. US Dept of Education 2022- 2027 to assist in annual report to congress. 3. TA HCBS and PASRR for CMS 2020-2025</li><li>• Bidder relates each project with the scope and capacity to carry out requirements of RFP and demonstrates ability to manage large projects with multiple data sets and deadlines.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Met. Subcontract with Advancing States, National Association of State Head Injury Administrators, National association of State Directors of Developmental Disabilities Services, National Council on Independent Living, Disabled Persons Protection Commission, and US aging,</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Met, none</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met. Provided '22, '23 and '24</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met. Includes general liability, workers comp and umbrella</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions

**DATE:** June 2, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1.<ul style="list-style-type: none"><li>• Bidder has wide variety of experience providing reports and analysis for federal agencies:<ul style="list-style-type: none"><li>○ Developed reports for ACL authorized under OAA using state reporting data and census population and projections data.</li><li>○ For US DOE- assist with annual report to congress re: implementation of IDEA</li><li>○ For CMS-Technical assistance for HCBS and PASRR</li></ul></li><li>• Doctoral level researchers and skill data scientists</li><li>• Team consists of national experts in aging, IDD and BI</li><li>• Approaching reporting with first taking data inventory and planning table listing types and leverages state department level knowledge</li><li>• Has a clear, detailed research and data analysis, reporting framework methodology</li></ul></li><li>2. Experience communicating via several communication mediums such as list serve, email. Virtual platform, in person with both internal and external parties<ul style="list-style-type: none"><li>• Identifies potential stakeholder types</li><li>• Provides multiple examples of communication approach with highlighting past projects</li></ul></li><li>3. Bidder states they are leading expert in 508 compliance.</li><li>4. Bidder states they will adhere to strict data management and confidentiality practices including secure STP file servers for data sharing, obtaining signed approval prior to sharing reports or information to external parties, security training for staff and clearance requirements.</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Detailed framework provided with recognition of statutory requirements for data and required information</li><li>2. Detailed framework provided with recognition of statutory requirements for data and required information</li><li>3. Detailed framework provided with recognition of statutory requirements for data and required information</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Provides work plans for each report with tasks, anticipated tasks deadlines and task owners.</li><li>2. Offers structured process for incorporating feedback.<ul style="list-style-type: none"><li>• Will manage changes via log and have a multistage review and interactive refinement</li></ul></li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** New Editions

**DATE:** June 2, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

3. Process to include gathering relevant data ad materials and mine them for background information. <ul style="list-style-type: none"><li>• Will hold one overall report planning meeting at the beginning of the contract (within 3 mos) at least one additional ad hoc virtual meeting can be scheduled for each report at Departments request</li><li>• Will used mixed methods for stakeholder input such as focus groups, interviews, online surveys etc.</li><li>• Meeting materials will be provided in advance for approval, meetings will be documented and activities recorded and tracked as part of project plans.</li></ul>	
4. Met.	
5. Met. Will track all data requests and inventory or work plan with anticipated release dates for initial and ongoing data refresh. This will be tracked according to estimated timelines and work plan will be adjusted if needed following discussion with Department.	
6. At start of each reporting cycle bidder will engage with Department staff to gain understanding of report scope, goals and priorities <ul style="list-style-type: none"><li>• Wil provide detailed outline of included summaries on goals, objectives, strategies, measures and achievements</li></ul>	
7. met	
8. met. Outlines need to know basis access, transmission requirements, designated points of contacts and NDA if needed	
9. met	
<b>2. Staffing</b>	
a. met	
b. met	
c. met	
<b>3. Implementation - Work Plan</b>	
a. Met. Broken down by report and very detailed.	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Health Systems

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Overview of organization lacked robust historical information. The example projects showed skill alignment but not content.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>None proposed</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>None noted</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Health Systems

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Response outlined assurance of RFP deliverables, but lacked logistical and implementation information.</li><li>2. Provided assurance, but not detailed implementation and logistical information.</li><li>3. Met requirement</li><li>4. Sufficient response provided.</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. Response outlined assurance of RFP deliverables, but lacked logistical and implementation information.</li><li>2. Response outlined assurance of RFP deliverables, but lacked logistical and implementation information.</li><li>3. Response outlined assurance of RFP deliverables, but lacked logistical and implementation information.</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Detailed plan provided</li><li>2. Sufficient response provided</li><li>3. Response provided key contextual information, but lacked detail on implementation.</li><li>4. Sufficient response provided</li><li>5. Detailed response provided</li><li>6. Detailed response provided</li><li>7. Detailed response provided</li><li>8. Detailed response provided</li><li>9. Response provided key contextual information, but lacked detail on implementation.</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Provided as requested</li><li>b. None noted</li><li>c. Detailed staffing plan provided</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Detailed plan provided</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Nyaa Scientific Research Services

**DATE:** 05/28/2027

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	<ul style="list-style-type: none"><li>• The organization was founded in 2021; reference is made to staff with over ten years' experience</li><li>• The Bidder stated experience with a broad range of health and human services projects for public and private entities</li><li>• Methods used in their work include data analysis, assessment of performance, data analytics and visualization, and report writing/presentation</li><li>• The Bidder cites several examples of work to demonstrate knowledge and experience with aging and disability populations, including a table of interim/final reports intended for publication</li><li>• Three projects are provided</li></ul>
<b>2. Subcontractors</b>	<ul style="list-style-type: none"><li>• No subcontractors are planned for this work</li></ul>
<b>3. Project Team Organizational Chart</b>	<ul style="list-style-type: none"><li>• A chart is provided</li><li>• There is a comment noted that refers to use of retainer-based subcontractors, if needed</li><li>• The team includes the executive director, senior/research scientists, disability specialists, research assistants and other specialists</li></ul>
<b>4. Litigation</b>	<ul style="list-style-type: none"><li>• The Bidder lists no litigation since they were founded in 2021</li></ul>
<b>5. Financial Viability</b>	<ul style="list-style-type: none"><li>• The Bidder provided balance sheets and profit and loss documents for the years 2022, 2023, and 2024.</li></ul>
<b>6. Certificate of Insurance</b>	<ul style="list-style-type: none"><li>• A certificate is provided, dated 10/11/2024; professional liability coverage is not noted</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Nyaa Scientific Research Services

**DATE:** 05/28/2027

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. The bidder provided details on how they plan to execute their work, including how they will clarify data, research and reporting needs, facilitate meetings, and generate reports; they will use data provided by the Department and specified other potential data sources</li><li>2. The project coordinator on the team will use a software tool (ASANA) to track all activity, including communication and status updates, and stakeholder engagement activity</li><li>3. The requirement is met</li><li>4. The Bidder stated an understanding of confidentiality; they expressed their organization's established process, which includes use of non-disclosure agreements, and access controls</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The Bidder expressed an understanding and plan to provided the required long term services and supports reports</li><li>2. The requirement is met</li><li>3. The Bidder provided details on providing the required adult protective services reports</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. A work plan is provided with the required details</li><li>2. The Bidder listed seven tasks to explain how report changes will be incorporated into interim reports to produce a final version</li><li>3. The requirement is met</li><li>4. The Bidder detailed the steps they will take to collaborate with the Department on the data points, data interpretations, and use of infographics and tables to best display the data</li><li>5. The requirement is met</li><li>6. The requirement is met</li><li>7. The Bidder provided a detailed, step-by-step process</li><li>8. The Bidder cites their internal data security and an understanding of this requirement</li><li>9. The requirement is met</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Job descriptions are not provided in detail; key background information is provided on 4 of the project team members, and there is some information about their roles on the project team; hourly cost information is provided on the project staff and other related costs</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Nyaa Scientific Research Services

**DATE:** 05/28/2027

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

b. Subcontractors are not planned
c. A staffing plan with required details is provided
<b>3. Implementation - Work Plan</b>
a. A Gantt chart is provided

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$963,615.02 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** 6/3/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Based in Great Lakes, MI</li><li>• Founded in 2021</li><li>• States that staff have 10+ years of experience in Social Determinants of Health for aging and disability populations</li><li>• States that senior staff have 30+ years of research experience in university systems</li><li>• I: Provided a table of past grant funded studies submitted for publication that are public health oriented</li><li>• N: Three recent projects are provided, but none of the project specifically described aging or disability population groups. In addition, projects described are primarily program evaluation in nature.</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• N: This section reports no subcontractors, but organization chart contains a note stating sub-contractors are used on an as needed basis</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• Provided organizational chart</li><li>• Q: Note above organizational chart references subcontractors as needed, but unknown which roles on the organization chart this applies to?</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• Not applicable</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Provided 2022, 2023, 2024</li><li>• Q: Reported a loss in 2024</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Acord provided, unable to locate professional liability coverage.</li><li>• Q: Additional insurance information provided on a printout of an account (not Acord form), note included seems to suggest a certificate is missing?</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** 6/3/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"><li>1. I: Cites the use of a social determinants of health framework for report development</li><li>2. P: Provides solid details with examples related to each phase of report development</li><li>3. Met requirements for plain language and confidentiality</li></ul>
B. Required Reports
<ul style="list-style-type: none"><li>1. Each LTSS report description meets requirements</li><li>2. Each IDD report description meets requirements</li><li>3. Each APS report description meets requirements</li></ul>
C. Report Development
<ul style="list-style-type: none"><li>1. P: General report development process is appropriate and includes reference to specific workgroups</li><li>2. P: Report changes are tracked using a change order approach which helps with quality assurance and version control</li><li>3. Interested party engagement proposal meets requirements</li><li>4. P: Infographic development includes brainstorming sessions</li><li>5. P: Data gathering process is highly detailed and contains additional options for data transformation (ETL environment) if desired.</li><li>6. P: Highly detailed security policy and protocols provided</li></ul>
2. Staffing
<ul style="list-style-type: none"><li>a. P: Each role contains a time allocation and proposed project team has representation from several key areas.</li><li>b. N: Unable to locate job descriptions</li><li>c. Q: Subcontractor description states none are planned, but suggests that this could change. In which case, Maine would be notified</li></ul>
3. Implementation - Work Plan
<ul style="list-style-type: none"><li>a. Met requirements</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Scientific Research Services

**DATE:** 06/09/25

**EVALUTOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• P-met requirement -founded 2021	
<b>2. Subcontractors</b>	
• P-none	
<b>3. Project Team Organizational Chart</b>	
• P-provided	
<b>4. Litigation</b>	
• P-none	
<b>5. Financial Viability</b>	
• P-provided	
<b>6. Certificate of Insurance</b>	
• P-provided. No Professional liability	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Scientific Research Services

**DATE:** 06/09/25

**EVALUTOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. P-provided plan</li><li>2. P-plan, including use of ASANA software for tracking purposes, provided</li><li>3. P-met requirement</li><li>4. P-met requirement</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. P-provide information</li><li>2. P-provided</li><li>3. P-information provided</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. P-provided information including Ghant Chart</li><li>2. Q-plan includes use of Change Order process</li><li>3. P-will use site selection and Negotiation process to ensure accessible meetings with interest holders</li><li>4. P-information provided</li><li>5. P-proposes use of ETL process (Extract, Transform, Load) for information gathering</li><li>6. P-multi stage data analysis system proposed, collaborative development and dissemination) -includes original data analysis, preliminary data analysis and Full data analysis.</li><li>7. P-provided plan</li><li>8. P-follows process for data release framework, includes staff training</li><li>9. P-information provided</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. P-information provided</li><li>b. P-provided information</li><li>c. Q-Provided information, but over all staffing pool seems small</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. P-provided plan with timeline chart</li></ol>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 6, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Bidder reports working with federal entities such as CDC, US EPA, HRSA and USDA</li><li>• Five principles for research, evaluation and learning; learn and adapt, learn in partnership, leverage information from a variety of sources, cultivate inquiry and share learning</li><li>• Provide detail on their process for determining proposed goals</li><li>• Founded in 2021</li><li>• Provides summaries of experience related to populations relevant to project scope</li><li>• Bidder provides details on previous projects including their length, scope and funding stating reports are available upon request</li><li>• Provided 3 projects. While not relevant to the populations in scope they did provide some details of relevancy re: tasks and data collection and analysis.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Met- will not use subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• none</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met- provided 22, 23 and 24</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 6, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. To meet department needs bidder will clarify data, facilitate meetings and conduct data collection and generate reports.<ul style="list-style-type: none"><li>• Bidder identified that activities related to services and outcomes can be undertaken through social determinants of health framework.</li><li>• Will clarify data, facilitate meetings and establish report generation framework.</li><li>• Research methodology includes awareness of and compliance with federal standards and guidelines for reporting, quantitative and qualitative statistical analysis of programs and key informant interviews.</li><li>• Reports will include recommendations to address gaps in service delivery or identified barriers</li></ul></li><li>2. Report planning and tracing will be completed using ASANA (project tool for for time tracking, delivery and work activities)<ul style="list-style-type: none"><li>• Will organize workgroups</li><li>• Provides minimal details about approach to communications, or facilitations of meetings.</li></ul></li><li>3. met</li><li>4. may use NDAs, data will be controlled through access control software and use PAM, MFA</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Bidder provides detail re: anticipated components of all three LTSS reports in alignment with the requirements outlines in the RFP however does not cite possible data sources to be used.</li><li>2. Bidder provides detail re: anticipated components of all DD reports in alignment with the requirements outlines in the RFP however does not cite possible data sources to be used.</li><li>3. Bidder provides detail re: anticipated components of all APS reports in alignment with the requirements outlines in the RFP however does not cite possible data sources to be used.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Provides high level description of what the bidder will do for each report<ul style="list-style-type: none"><li>• Provides gantt chart of proposed workplan</li><li>• Indicates their process allows for “just in time responses to emerging issues”</li></ul></li><li>2. Details change request process and expected process</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Nyaa Scientific Research Services – Nyaa Health

**DATE:** June 6, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

- |  |
|--|
| <ol style="list-style-type: none"><li>3. Will research appropriate venues and locations for stakeholder engagement but will also adopt hybrid approach to include virtual meeting options<ul style="list-style-type: none"><li>• Acknowledges requirement for meeting documentation in both written and audio format</li></ul></li><li>4. met</li><li>5. Bidder provides detailed description of process to gather and review data</li><li>6. met</li><li>7. met requirements. Provides sample overview of process and description of process</li><li>8. met. Includes a monitoring practice and audit of data security</li><li>9. mis numbered as 7 however bidder identifies steps that will be identified to update data sources and reports ongoing.</li></ol> |
|--|

<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. met</li><li>b. Met. None planned</li><li>c. met</li></ol>



<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. met</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Robust agency description with detailed history and alignment with the asks of the RFP.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>None proposed</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>Information provided-litigation noted</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Exceptionally detailed response provided.</li><li>2. Approach was well described, but more logistical implementation details were needed.</li><li>3. Detailed response provided.</li><li>4. Detailed response provided.</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. Thorough and detailed response provided outlining report approach.</li><li>2. Thorough and detailed response provided outlining report approach.</li><li>3. Thorough and detailed response provided outlining report approach.</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Exceptionally detailed plan provided</li><li>2. Thorough and detailed response provided</li><li>3. Thorough and detailed response provided</li><li>4. Detailed response provided</li><li>5. Detailed response provided</li><li>6. Detailed response provided</li><li>7. Thorough and detailed response provided</li><li>8. Thorough and detailed response provided</li><li>9. Thorough and detailed response provided</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Provided as requested</li><li>b. None noted</li><li>c. Provided as requested</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Detailed work plan provided.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Public Consulting Group

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Based in Boston, MA</li><li>• Founded in 1986 (in business ≈38 years)</li><li>• Clients are largely state, county and municipal entities</li><li>• Current contracts in all 50 states; 3000 contracts globally</li><li>• The Bidder cites their advantage of being a person-centered organization, and their experience/understanding with aging/long term services and supports, developmental disability and brain injury, and adult protective services</li><li>• The Bidder provides extensive detail about their experience, including a description of eight projects performed for Maine, chart/description of 15 projects in other states that demonstrates experience with aging/disabled populations, data analysis and producing reports</li><li>• Three relevant projects are provided</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• The Bidder does not intend to use subcontractors</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• A chart is provided, listing 8 team members</li><li>• The project manager/APS lead is a former DHHS/OADS employee (Office legal consultant/APS Associate Director</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• 18 cases are listed</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Audited financial statements are provided for 2021 - 2024</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• A certificate dated 3/27/2025 is provided' professional liability coverage is included</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Public Consulting Group

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. The Bidder will adhere to structured project management principles in Project Management Body of Knowledge® (PMBOK); they described their approach and each major component (launch, discover, engage, analyze, and reporting) in a step-by-step process</li><li>2. The Bidder did not explain how they will coordinate and facilitate communications and meetings with Department-identified stakeholders for conducting research, analysis, and reporting process</li><li>3. The requirement is met</li><li>4. The Bidder stated an understanding and experience with maintaining confidentiality, including following established best practices</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The Bidder provided a details response on their plan to produce the required long term services and supports reports</li><li>2. A detailed plan is provided for producing the required developmental disability and brain injury reports</li><li>3. A detailed plan is provided to produce the required adult protective services reports</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. A Gantt chart is provided</li><li>2. The Bidder provided their plan to incorporate report changes, as requested/needed</li><li>3. The Bidder provided a chart of proposed engagement activities by report (including a documentation plan), a sample letter to stakeholders, and additional details on how they will collect data and input from Department, stakeholders, and others as required by the RFP</li><li>4. The requirement is met</li><li>5. The Bidder states they will work with the Department to develop a plan to obtain data, and they cite an advantage with the project manager's familiarity with the Department's Evergreen client data system</li><li>6. The requirement is met</li><li>7. The Bidder refers the Department to other sections of proposal for their plan to submit the final reports for approval and how report changes will be incorporated</li><li>8. The requirement is met</li><li>9. The Bidder met the requirement</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Roles, responsibilities and qualifications of specific team members is provided</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Public Consulting Group

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

b. No subcontractors
c. Minimal information is provided for the staffing plan
<b>3. Implementation - Work Plan</b>
a. A detailed Gantt chart is provided

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$1,364,445.42 total fixed cost</li></ul>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group

**DATE:** 6/4/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Located in Boston, MA and in operation for 38 years</li><li>• States the organization specializes in public sector evaluation across human services, health and Medicaid agencies.</li><li>• Recently completed an evaluation for OADS Brain Injury Services</li><li>• Overview cites experience in evaluation for several additional Maine offices</li><li>• I: Offers SME specific to Maine APS</li><li>• Q: The three recent projects cited, while completed with relevant population, most projects were focused on quality improvement or specific program evaluation</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• Not applicable</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• I: Cited 8 litigation cases in the past 5 years. Did not provide settlement amount and cited confidentiality provisions.</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Met requirement</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• Met requirement</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group

**DATE:** 6/4/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P: Cites the use of project management model</li><li>2. P: Describes 5 major phases of report preparation. Each phase is well articulated.</li><li>3. Q: While proposal describes guiding principles for interest holder engagement, description lacks a description of the actual process used.</li><li>4. P: In addition to describing methods for ensuring accessibility, proposal included specific examples of past projects for which these methods were applied.</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P: LTSS report section includes a table highlighting each development stage along with thoughtful details regarding report content.</li><li>2. P: IDD report section states SME has several years of experience developing legislative reports for this population</li><li>3. P: APS section provides a helpful outline of suggested report content for the APS annual state plan</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. P: Report change process is clearly articulated and includes feedback loops</li><li>2. P: Interest holder engagement includes solid explanation of approach to planning and executing sessions. The proposal includes a highly detailed table by report type outlining sample engagement activities.</li><li>3. Description of data visualization meets requirements.</li><li>4. N: Data extraction description focuses on data stored in Evergreen and many of our reports use data that is not stored in Evergreen.</li><li>5. P: Proposal includes helpful sample monthly status report with important metrics for monitoring progress.</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Job descriptions meet requirements</li><li>b. Staffing plan with time allocation meet requirements</li><li>c. Subcontractors are not applicable</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. P: Gantt chart includes 5 years of work</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group LLC

**DATE:** 6/10/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• P-headquartered in Boston Mass</li><li>• P-Founded in 1986</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• P-none</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• P-provided</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Q-Multiple litigations, many involving previous employees</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• P-information provided</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• P-information provided. No professional liability coverage</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group LLC

**DATE:** 6/10/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P-provided detailed plan</li><li>2. P-Provided detailed plan withuse of plain language documents</li><li>3. P-provided detailed plan which includes a multi-layered approach</li><li>4. P-provided information</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P-provided plan, LTSS Report lead with over 10 years of experience. 4 phase approach- Discover, Engage, Analyze, and repor.t</li><li>2. P-plan provided w 4 phase approach (D, E, A, and R)</li><li>3. P-plan provided</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. P-provided plan and Ghant chart</li><li>2. P-provided detailed plan</li><li>3. P-provided detailed plan including interviews with community stakeholders</li><li>4. P-provided a plan which includes a collaborative process w/Department</li><li>5. P-points to direct Maine experience with data system (Evergreen)</li><li>6. P-use of communication plan</li><li>7. P-detailed plan</li><li>8. P-plan provided, but brief- 24 /7 Security Operations Center</li><li>9. P-plan provided</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. P-provided</li><li>b. P-provided- no subcontractors used</li><li>c. P-provided</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. P-provided information</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group LLC

**DATE:** June 9, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• National company serving most states for more than 38 years</li><li>• Founded in 1986 and headquartered in Boston MA.</li><li>• Has more than 3000 open contracts globally</li><li>• Over 2000 employees throughout US</li><li>• Company has worked with human services and Medicaid agencies to research, review and analyze systems, identify gaps and provides recommendations and plans to support efficient</li><li>• Cited several projects in areas of aging and older adults, adults with DD and APS including master plans in aging and assessment of needs. Specifically citing APS work done with OADS in 2017</li><li>• Cites other PCG work in Maine including data and survey for TANF, OCFS and MC rate analysis</li><li>• Listed 3 projects: 1. Minnesota DHS to conduct business process reviews which included process mapping, interviews and reporting 2. Kansas ADS studying targeted case management system 3. Ohio Medicaid oversight and development for compliance and quality assurance activities</li><li>• Projects listed, while relevant to work at Maine DHHS and OADS – does not address work to be completed as part of RFP. Projects listed seem more programmatic and compliance focused versus data analysis.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Met. n/a will not use.</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met. Project manager past OADS Associate Director.</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Bidder lists over 20 cases with various scope and outcome.</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met provided 21, 22 ,23 and 24</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met includes professional liability</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group LLC

**DATE:** June 9, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. I:Adhere to core principles found in project mgt body of knowledge.<ul style="list-style-type: none"><li>• Collective approach to reporting has five components: launch, discover, engage, analyze and report. Bidder provides various levels of detail for each description of tasks that fall within each component.</li></ul></li><li>2. will engage stakeholders through focus groups, interviews, community forums and surveys<ul style="list-style-type: none"><li>• stakeholder engagement will prioritize diversity, inclusivity and equity</li><li>• communication and pubic facing documents will be written in plain language using concepts of Universal Design for Learning.</li><li>• Provides high level overview of communication however response lacks detail about how to handle meeting materials and timelines.</li></ul></li><li>3. Adheres to accessibility under Plain Writing Act of 2010 and 508 compliance<ul style="list-style-type: none"><li>• Describes multilayered approach to content development that accounts for plain lang and accessibility standards using staff that are trained in digital accessibility and plain lang best practices</li><li>• Using document zone approach to document organization</li><li>• Uses adobe pro accessibility</li><li>• Uses peer review process to conduct accessibility audits</li></ul></li><li>4. Uses secure document library<ul style="list-style-type: none"><li>• Minimizes use of printed material</li><li>• Leverages version control</li><li>• Employs role based access controls</li><li>• Confidential data is encrypted</li><li>• Uses intrusion detection systems</li></ul></li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. LTSS reports: Provides detailed approach to report and report activities within the bidders proposed framework.<ul style="list-style-type: none"><li>• Identifies general internal and external data sources that may be used.</li><li>• Bidder does not identify timeframes within this section</li></ul></li><li>2. DD reports: Provides detailed approach to report and report activities within the bidders proposed framework.<ul style="list-style-type: none"><li>• Identifies general internal and external data sources that may be used.</li><li>• Bidder does not identify timeframes within this section</li></ul></li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Public Consulting Group LLC

**DATE:** June 9, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

3. APS reports: Provides detailed approach to report and report activities within the bidders proposed framework. <ul style="list-style-type: none"><li>• Identifies general internal and external data sources that may be used.</li><li>• Bidder does not identify timeframes within this section</li></ul>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Provides gantt chart that outlines specific report activities with anticipated timeframes with task owner</li><li>2. Bidder states they have built in feedback loop<ul style="list-style-type: none"><li>• States they build in time for two rounds OADS leadership review in project plan with two week review windows between each with more time if possible.</li><li>• Provides a clear of steps for document and change review</li></ul></li><li>3. Bidder provides table with report specific engagement activities which includes: interviews, survey, community forums, and workgroup meetings<ul style="list-style-type: none"><li>• Provides sample draft email for stakeholder communication</li><li>• Proposes to hold annually: 3-5 community forums, 5 virtual listening sessions, 6-10 focus groups and 1-2 focus interviews with OADS</li></ul></li><li>4. met</li><li>5. will work with the Department to establish the mechanics of data extraction to maintain data integrity and security<ul style="list-style-type: none"><li>• Bidder focuses heavily on the reliance of Data from evergreen. Evergreen will provide limited data related to DD and APS</li></ul></li><li>6. Proposes monthly summary reports that will be circulated 2 days prior to due date<ul style="list-style-type: none"><li>• Will also provide annually summary of work completed previous year</li><li>• Provided sample monthly summary which include highlights and achievements, challenges and plans to success, deliverables and strategies, key metrics updates</li></ul></li><li>7. Met</li><li>8. Need to know policy, use of SharePoint and encryption of electronic files<ul style="list-style-type: none"><li>• 24/7 security operations center monitors suspicious activity including file transfers, email and attempted USM extractions</li></ul></li><li>9. Met.</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. met</li><li>b. met</li><li>c. met</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. met</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Robust agency description with detailed history and alignment with the asks of the RFP.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Proposed subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Provided as requested</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• None noted</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Provided as requested</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Provided as requested</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of

**ADS BIDDER NAME:** The Urban Institute

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
1. Detailed description provided. 2. Sufficient response provided. 3. Sufficient response provided. 4. Detailed response provided.
<b>B. Required Reports</b>
1. Detailed plan provided. 2. Detailed plan provided. 3. Detailed plan provided.
<b>C. Report Development</b>
1. Provided as requested. 2. Thorough and flexible plan described. 3. Detailed response provided. 4. Lacking logistical and implementation details. 5. Detailed response provided. 6. Detailed response provided. 7. Detailed response provided. 8. Detailed response provided. 9. Detailed response provided.
<b>2. Staffing</b>
a. Detailed plan provided as requested. b. None noted c. Detailed plan provided as requested.
<b>3. Implementation - Work Plan</b>
a. Detailed plan provided as requested.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** The Urban Institute

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Based in Washington, DC</li><li>• Established in 1968 (in business 57 years)</li><li>• The Bidder provided a description of their knowledge and experience with topic areas (long term services and supports, developmental disability and brain injury, and adult protective services)</li><li>• They provided information about their expertise in collecting, securing, and analyzing a variety of data</li><li>• Three projects are provided</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• Two subcontractors are listed</li><li>• The subcontractors will provide consultation on organizational capacity and qualification</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• An organizational chart is provided, however the project team is not identified</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• The Bidder indicates no litigation during the past five years</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Audited financial statements are provided for 2022-2023; year-end is December</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• A certificate is provided dated 1/3/2025, with professional liability coverage</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** The Urban Institute

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. The Bidder will use Task Leaders to serve as subject matter experts for each major report area; the requirement is met</li><li>2. The Bidder met the requirement</li><li>3. The Bidder explained their understanding, experience and plan regarding use of plain language and meeting 508 requirements</li><li>4. A detailed plan regarding confidentiality is provided, including an established data security plan</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. The Bidder explained their plan to produce the required long term services and supports reports, including use of the Urban Institute's Dynamic Simulation of Income Model (DYNASIM)</li><li>2. The Bidder explained their plan to produce the required developmental disability and brain injury services reports, including identifying potential sources of data</li><li>3. The Bidder explained their plan to produce the required adult protective services reports, including a detailed five step plan (initial engagement, extraction of Evergreen data, access/use of other data, drafts, and final products)</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. The Bidder met the requirement</li><li>2. The plan to incorporate report changes is included in the Bidder's Gantt chart</li><li>3. The Bidder provided a plan and meets the requirement</li><li>4. The requirement is met</li><li>5. The Bidder indicates use of data sharing agreement</li><li>6. The requirement is met</li><li>7. The Bidder explained their plan submit the final reports and make report changes</li><li>8. The Bidder expressed an understanding of confidentiality requirements for staff and subcontractors; confidentiality/non-disclosure agreements will be adhered to; data access will be limited to team members who need the information; data will not published/released without approval</li><li>9. The Bidder included specific information on their plan to gather/analyze new data as it becomes available</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Job duties/responsibilities for the team members is provided</li><li>b. The two subcontractor/consultants will report to a specific team member (Task 2 Leader); they will contribute the disability reports</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** The Urban Institute

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

c. A staffing plan with required details is provided
<b>3. Implementation - Work Plan</b>
a. A Gantt chart is provided

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$2,058,469 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** 6/5/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Located in Washington D.C.</li><li>• Established in 1968</li><li>• Organization includes three subdivisions with specialized expertise related to populations served by OADS (LTSS, Disability Studies, Adult Protective)</li><li>• P: Two projects cited involved research related to Elder Abuse Prevention and Older Workers</li><li>• I: Additional project cited took place in Maine, but was focused on housing</li><li>• N: No projects described included specific examples of legislative reporting for the developmental disability population.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Proposed the use of two subcontractors</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• Not applicable</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Provided 2021, 2022, 2023. Did not include CY2024</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Acord Provided, professional liability not included</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** 6/5/2025

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P: Sufficiently detailed description of general requirements, which includes major phases of research and report development and quality assurance.</li><li>2. Met requirements</li><li>3. P: Plain Language and 508 requirements clearly articulated and includes work by SME in this area.</li><li>4. P: Thorough explanation of data security practices, which includes a detailed data security plan specific to this project</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P: The LTSS Biennial report proposal includes the option of DYNASIM</li><li>2. Q: Unclear what specific content would be included for IDD report types?</li><li>3. P: APS report descriptions provide specific details regarding report content, along with specific evaluation/research questions</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Workplan description met requirement</li><li>2. P: Cites the importance of completing reports to allow for sufficient department review</li><li>3. Q: Interest holder engagement suggests a limit of 8 for focus groups, might be too small?</li><li>4. Data sharing description meets requirements.</li><li>5. Progress summaries description meets requirements</li><li>6. Met requirement</li><li>7. Met requirement</li><li>8. Met requirement</li><li>9. Q: This item does not clearly explain how bidder will plan for data changes needed in future reports, but does include additional helpful suggestions for additional data sets?</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Met requirement</li><li>b. N: While an explanation as to who is responsible for the work of the subcontractor(s), there is no explanation of oversight</li><li>c. Met Requirement</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. P: In addition to chart, proposal provided additional detail regarding stages of report development and major deadlines</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** 6/11/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• P-provided- Sarah Rosen Wartell CEO, based in Washington D.C. Est.1968</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• P-Lauren Schwabish</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• P-provided without individual names</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• P- None</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• P-provided but no 2024</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• P-information provided</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** 6/11/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P-provided detailed plan</li><li>2. P-provided plan including monthly progress and expenditure reports</li><li>3. P-provided plan</li><li>4. P-provided detailed plan with proposed CBO Advisory panel (community Based Organizations)</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. P-provided detailed plan</li><li>2. P-provided detailed plan using the American Community survey data</li><li>3. P-5 step plan</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. P-provided plan with Ghant Chart</li><li>2. P-plan includes up to two months for iterative revisions between draft and final revisions</li><li>3. P-plan provided, relies heavily on stakeholder input captured virtually</li><li>4. N-brief response, relying on Departmental Liaison</li><li>5. P-met requirement</li><li>6. P-plan provided involves monthly updates to a Department Liaison</li><li>7. P-met requirement</li><li>8. Q-plan provided involves confidentiality pledges from staff</li><li>9. Q-plan provided involving multiple data sources</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. P-provided information</li><li>b. p-plan provided</li><li>c. P-plan provided with highly credentialed staff</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. P-very detailed implementation plan</li></ol>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** June 10, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Established in 1968</li><li>Based in Washinton DC</li><li>Has more than 600 researchers, data scientist and methodological experts</li><li>Bidder highlights experience with data analysis in key policy areas including aging and disability, youth, crime, justice, safety and housing</li><li>Relevant research in LTSS services in areas of family caregivers and people with dementia</li><li>Research has been nationally and legislatively recognized by congress and policymakers</li><li>Provides research in disability services, however unclear if population includes IDD or physical disabilities</li><li>Provided 3 projects: 1. Older workers study through US Dep of Labor. Project relevant to the population however appears to be focused on improvement of employment services 2. US Department of Justice to evaluate EMPOWER program 3. J T Gorman Foundation related to housing .</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>Provider will use 2 sub contractors however their roles were unclear</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Organization chart provided but does not list project team names</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>none</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Provided 21, 22 and 23</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Met. includes professional liability</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** June 10, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Staffing plan includes task leaders that are experts in each of the topic areas in the scope of the RFP<ul style="list-style-type: none"><li>• Bidder provides description of role and tasks that are within the purview of each role</li><li>• Indicates that their data security plan for non-public use admin data must be reviewed and approved by Urban Institutional Review Board (IRB)</li><li>• Team members must sign confidentiality pledges and release of any information will require written approval</li><li>• Bidder mentions they will include supplemental data that is publically available to relevant populations and RFP required reports</li></ul></li><li>2. Will participate in kick off meeting to understand the Departments expectations, project design and goals<ul style="list-style-type: none"><li>• No later than the 15<sup>th</sup> of each month we will provide the Department liaison with monthly progress and expenditure reports</li><li>• Bidder does not include any details or plans for communication or engagement wth internal or external stakeholders</li></ul></li><li>3. Met. states they will use department approved template, be in plain language and be 508 compliant but provided no details on process in which this will be achieved other than multi-level review</li><li>4. Describes layered network of network security which includes firewalls,, policies, training and physical security.<ul style="list-style-type: none"><li>• Uses data encryption and has access control lists and 24 hour network monitoring</li><li>• will not publish, present, or release any information without submitting a written request and receiving the Department's approval.</li></ul></li></ol>
B. Required Reports

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** The Urban Institute

**DATE:** June 10, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

1. Meets requirements. Bidder states they will use both internal and external data sources. Provides example of external sources
  - I : Bidder states they will use the Urban Institutes Dynamic Simulation of Income model. To project the share and number of state residents who are likely to need LTSS services in the future.
2. Minimally Meets requirements as they do not provide detail about how they will meet requirements of the legislatively required reports identified in the RFP. Bidder states they will use both internal and external data sources. Provides example of external sources
  - Bidder states they will use the BRFSS as data resource
3. Met requirement.

**C. Report Development**

1. Provides gantt chart
2. met
3. Bidder states they will hold 3 virtual meetings in year 1 (one for each topic area) and 1 virtual meeting for years 2-5
  - Will conduct virtual focus for each topic in years 1 and 3
  - Goal is to hold 3 focus groups with 8 participants each
4. Minimal response
5. Met requirement
6. Monthly progress notes will be provided prior to the 15<sup>th</sup> of each month
7. Met requirement
8. Met requirement
9. Bidder provides example of publicly sourced data and refresh times.

**2. Staffing**

- a. met
- b. met
- c. met

**3. Implementation - Work Plan**

- a. met

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Detailed agency information provided. Noted lack of content alignment with RFP.</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>None proposed</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>None noted</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Provided as requested</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. Significant lack of detail noted in this response.</li><li>2. Significant lack of detail noted in this response.</li><li>3. Met with minimum response</li><li>4. Acknowledged confidentiality needs, but did not provide a specific, clear, well developed answer to this element in the RFP.</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. Specific and articulated information about this RFP element was absent from the bidder's response.</li><li>2. Specific and articulated information about this RFP element was absent from the bidder's response.</li><li>3. Specific and articulated information about this RFP element was absent from the bidder's response.</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Provided as requested, but does not appear to accommodate the legislative timelines</li><li>2. Not met</li><li>3. A specific, clear, well-developed answer to this element in the RFP is missing from the bidder's response.</li><li>4. Not met</li><li>5. A specific, clear, well-developed answer to this element in the RFP is missing from the bidder's response.</li><li>6. A specific, clear, well-developed answer to this element in the RFP is missing from the bidder's response.</li><li>7. A specific, clear, well-developed answer to this element in the RFP is missing from the bidder's response.</li><li>8. A specific, clear, well-developed answer to this element in the RFP is missing from the bidder's response.</li><li>9. A specific, clear, well-developed answer to this element in the RFP is missing from the bidder's response.</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Provided as requested</li><li>b. None noted</li><li>c. Provided as requested</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Provided as requested</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Tury Research Institute

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Based in Manning, SC</li><li>• Established in 2021</li><li>• Perform research and consultation, specialize in public health, policy evaluation, epidemiology, and advanced data analytics</li><li>• The Bidder's response indicates that they will conduct the evaluation of the Maine SNAP-Ed program</li><li>• Three projects are provided</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• This reviewer did not find this item addressed</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• A description and chart of the project team is provided</li><li>• The team includes an executive lead, project director, project coordinator, research and policy analysts, engagement coordinator, and administrative support</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• The Bidder states no litigation during the past five years</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• The Bidder did not provide financial statements</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• A certificate is provided dated 1/2/2025, and includes professional liability coverage</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Tury Research Institute

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II --- The Bidder did not follow the required format, thus making it difficult to understand/evaluate each area below</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. This evaluator did not find a clear response the explains the Bidder's plan to coordinate and provide research, data analysis, and reporting, nor did the Bidder address their plan regarding data</li><li>2. Minimal response</li><li>3. Minimal response</li><li>4. This evaluator did not find a response to address the confidentiality requirement</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. The report requirements for long term services and supports were not addressed specifically</li><li>2. There was no detailed plan to produce the developmental disability and brain injury reports</li><li>3. There was no detailed plan to produce the adult protective services reports</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Minimal response, format not followed</li><li>2. Minimal response, format not followed</li><li>3. Minimal response, format not followed</li><li>4. Minimal response, format not followed</li><li>5. Minimal response, format not followed</li><li>6. Minimal response, format not followed</li><li>7. Minimal response, format not followed</li><li>8. Minimal response, format not followed</li><li>9. Minimal response, format not followed</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Job duties, responsibilities, and required qualifications for team members are provided</li><li>b. No subcontractors are planned for this work</li><li>c. A staffing plan is provided</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. The Bidder provided a work plan, including a Gantt chart</li></ol>
<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$2,588,400.00 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** 6/5/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>Established in 2021</li><li>Offers research and consulting services</li><li>Has experience in public health and data analytics</li><li>N: Overview states that organization is prepared to evaluate Maine's SNAP program which is not part of the scope of this RFP</li><li>N: The three projects submitted did not include examples of research or reporting work with populations served by OADS, nor did the examples involve legislative reporting</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>N: Bidder did not submit completed subcontractor form</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>Met requirement</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>Not Applicable</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>N: Bidder did not provide financial documents</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>Met requirement</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** 6/5/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. N: Unable to locate supporting documentation related to statement that project team includes professionals with experience in LTSS and relevant client populations served by OADS</li><li>2. N: RFP template was altered and bidders response for each section does not address the prompt</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. N: Did not meet requirements. Proposal simply lists the reports required and provides no explanation as to what content is proposed for each report.</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. Q: Project Planning lists only two phases, what other phases would be expected for a project like this?</li><li>2. N: Data collection omits surveys as a data source</li><li>3. Interest holder engagement description meets requirements</li><li>4. N: Content states plain language principles will be used, but offers no additional details of how that will happen or what the principles are</li><li>5. Review description meets requirements</li><li>6. N: Technology- data security does not describe how project team is trained</li><li>7. P: Collaboration includes a dashboard that provides weekly project progress monitoring</li><li>8. P: Offers multi-layered QA process</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Met requirements</li><li>b. Met requirements</li><li>c. Met requirements</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. Met requirements</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** 6/11/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Service

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**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• P-Alexander Bindu Kalesan CEO, HQ'd in Manning South Carolina, Est. 2021</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Q-cannot locate</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• P-provided</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• P-none</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Q-cannot locate</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• P-provided, includes Professional liability</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** 6/11/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** Office of Aging and Disability Service

<b>Part IV, Section III. Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ol style="list-style-type: none"><li>1. P-provided plan, but very brief</li><li>2. N-lacks detail</li><li>3. N-did not provide</li><li>4. N-could not locate due to formatting or organizational content</li></ol>
<b>B. Required Reports</b>
<ol style="list-style-type: none"><li>1. Q,N-could not locate</li><li>2. Q,N-could not locate</li><li>3. Q,N-could not locate</li></ol>
<b>C. Report Development</b>
<ol style="list-style-type: none"><li>1. N-Proposal is out of sequence and misnumbered throughout</li><li>2. N-provided but very brief and lacking meaningful response</li><li>3. N-brief response reworking our question</li><li>4. N-Cannot locate- out of order</li><li>5. N-all materials will undergo:Internal review, compliance review, approval from Dept.</li><li>6. N-cannot locate</li><li>7. N-Cannot locate</li><li>8. N-no response</li><li>9. N-cannot locate</li></ol>
<b>2. Staffing</b>
<ol style="list-style-type: none"><li>a. Q-provide but out of order</li><li>b. N-cannot locate</li><li>c. N-cannot locate</li></ol>
<b>3. Implementation - Work Plan</b>
<ol style="list-style-type: none"><li>a. P-provided with timelines</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** June 10, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>Established in 2021</li><li>Multidisciplinary team of senior level and PHD researchers, clinicians and technicians</li><li>Q; I: bidder states they are uniquely positioned to evaluate Main SNAP Ed. Is the bidder responding to correct RFP?</li><li>Provided three projects that were not relevant to the scope of this RFP</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>n/a</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>met</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>none</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>Not met</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>Met. Includes professional liability</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** June 10, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
<b>Part II</b> Bidder did not follow RFP response format therefore unclear where responses align to requirements.
A. General Requirements
<ol style="list-style-type: none"><li>1. Not met. Bidder provided minimal response reiterating requirements outlines in RFP with no detail.<ul style="list-style-type: none"><li>• Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li></ul></li><li>2. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>3. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>4. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>2. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>3. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>2. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>3. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>4. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>5. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>6. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li><li>7. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** Tury Research Institute

**DATE:** June 10, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

8. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.
9. Not met. Bidder did not follow RFP response format therefore unclear where responses align to requirements.
<b>2. Staffing</b>
a. Met
b. n/a. will not use sub contractors
c. met
<b>3. Implementation - Work Plan</b>
a. Minimally Met however most of implementation plan was list of tasks in word like format over several months of time. Gantt provided but with oversimplified activities and grouped timeframes.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
• Information provided, noted current/prior engagement with the department.	
<b>2. Subcontractors</b>	
• Proposed subcontractors noted	
<b>3. Project Team Organizational Chart</b>	
• Provided as requested	
<b>4. Litigation</b>	
• Information provided- litigation noted	
<b>5. Financial Viability</b>	
• Provided as requested	
<b>6. Certificate of Insurance</b>	
• Provided as requested	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** 6-3-2025

**EVALUATOR NAME:** Jessica Benson-Yang

**EVALUATOR DEPARTMENT:** DHHS-OBH

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Provided high-level overview, noting use of available datasets and a focus on the legislative timeline.</li><li>2. Outlined general approach, but lacked specific implementation &amp; logistical details.</li><li>3. Detailed response provided.</li><li>4. Met requirement.</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Clear and detailed plan provided, including references to specific statutes and requirements.</li><li>2. Clear and detailed plan provided, including references to specific statutes and requirements.</li><li>3. Clear and detailed plan provided, including references to specific statutes and requirements.</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Detailed description, including statutory timelines, was provided. However, a visual, timeline or chart was not provided or referenced in this section.</li><li>2. Met requirement</li><li>3. Specific implementation and logistical details absent.</li><li>4. Insufficient detail provided</li><li>5. Insufficient detail provided</li><li>6. Insufficient detail provided</li><li>7. Met requirement</li><li>8. Met requirement</li><li>9. Insufficient detail provided.</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Exceptionally detailed information provided.</li><li>b. Detailed plan identified for work with subcontractors.</li><li>c. Exceptionally detailed information provided.</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. Exceptionally detailed information provided.</li></ol>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
	<ul style="list-style-type: none"><li>• Based in Portland, ME</li><li>• Work will be performed by The Cutler Institute/Survey Research Center</li><li>• The Bidder outlined their experience, qualifications, and skills to perform the proposed work</li><li>• They partner with their Data Innovation Project (DIP), experts in data visualization strategies</li><li>• The Bidder is the current 'research and reporting' provider for the Department</li><li>• Three relevant projects are provided, including performing the work in the previously awarded RFP</li></ul>
<b>2. Subcontractors</b>	
	<ul style="list-style-type: none"><li>• McGuire Consulting Services, for expertise with a variety of health care data sets</li><li>• NetCentric Technologies, Inc. DBA Allyant, for Section 508 compliance</li></ul>
<b>3. Project Team Organizational Chart</b>	
	<ul style="list-style-type: none"><li>• An organizational chart identifying the project team is provided</li></ul>
<b>4. Litigation</b>	
	<ul style="list-style-type: none"><li>• Three cases are listed</li></ul>
<b>5. Financial Viability</b>	
	<ul style="list-style-type: none"><li>• Financial statements for 2022-2024 are provided</li></ul>
<b>6. Certificate of Insurance</b>	
	<ul style="list-style-type: none"><li>• A certificate dated 4/10/2025 is provided, with professional liability coverage indicated</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. The requirement is met</li><li>2. The Bidder states they will identify expectations and present options for meetings/communications with stakeholders; they will design necessary materials, facilitate group discussions/listening sessions, and provide documentation of activity</li><li>3. The requirement is met; a subcontractor will certify Section 508 compliance</li><li>4. The Bidder met the requirement</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. The Bidder provided details on how the required long term services and supports reports will be produced</li><li>2. A detailed plan is provided to produce the required developmental disability and brain injury services reports</li><li>3. The Bidder provided details to meet the requirements related to the adult protective services reports</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. The Bidder met the requirement</li><li>2. The Bidder described a plan with detailed turn-around times for incorporating report changes</li><li>3. The Bidder met the requirement</li><li>4. The Bidder reflected upon their experience, and they will commit to engage their team of graphic design experts in data visualization strategies to produce the required reports</li><li>5. The requirement is met</li><li>6. A project management tool will be used</li><li>7. The requirement is met</li><li>8. The Bidder has an established process to ensure confidentiality; staff are trained annually</li><li>9. The requirement is met</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. Job descriptions of the project team with details about roles, responsibilities, and qualifications are provided</li><li>b. The requirement is met</li><li>c. A detailed staffing plan is provided</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. A Gantt chart is provided, listing all the required details</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** RFP 202503044

**RFP TITLE:** Research and Reporting on Aging and Disability Services

**BIDDER NAME:** Univ of Maine System acting through Univ of Southern Maine

**DATE:** 06/04/2025

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/Office of Aging and Disability Services

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>• \$783,880 total fixed cost</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** 6/5/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• P: The Cutler Institute of USM has research expertise in LTSS and all population groups served by OADS</li><li>• I: For the last 5 years, USM completed many of the previous reports required under this project</li><li>• P: USM also has a partnership with the Data Innovation Project</li><li>• P: All three projects are relevant and two are examples of reports completed for OADS previously</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Description of two proposed subcontracts met requirements</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Met requirements</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• I: Proposal cites 3 cases, 2 of which settled for \$50,000 or less. 1 case is pending</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Submitted 2022, 2023, 2024 records</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met requirement</li></ul>	

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** 6/5/25

**EVALUATOR NAME:** Noelle Neault

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. P: Proposes to include several relevant data sources (e.g., MDS, RCA)</li><li>2. Interest holder engagement proposal met requirements</li><li>3. P: Plain language approach includes checks against biased language</li><li>4. Confidentiality description meets requirements</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. P: LTSS proposal provides a highly detailed account of report development and content with specific references to OADS programs</li><li>2. P: IDD through description for each report type and indicates that USM will perform additional research and offers suggestions specific to system reform (e.g., Lifespan)</li><li>3. P: APS provides thorough description of each report's focus and proposed content</li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. Workplan description met requirement</li><li>2. Report change description met requirement</li><li>3. P: Offers a variety of interest holder engagement activities while ensuring accessibility</li><li>4. Data visualization met requirement</li><li>5. Data sharing proposal met requirement</li><li>6. P: Project progress will be monitored using project management software</li><li>7. Q: In addition to policies and staff training, what additional safeguards are in place&gt;</li></ol>
2. Staffing
<ol style="list-style-type: none"><li>a. P: Staffing plan includes job descriptions for several key roles with appropriate qualifications</li><li>b. Subcontractor oversight description met requirement</li><li>c. P: Exceeded requirement by included detailed plan over next 5 years</li></ol>
3. Implementation - Work Plan
<ol style="list-style-type: none"><li>a. Met requirement</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** 6/11/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• P-provided Tamara Blair Kirk director. HQ'd Biddeford Maine.</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• McGuire Consulting Services, NetCentric Technologies INC. dba Allyant,</li></ul>
<b>3. Project Team Organizational Chart</b>
<ul style="list-style-type: none"><li>• P-provided</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• 3 cases-2 negligence, 1-First amendment Retaliation</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• P-provided detailed information</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• P-provided- includes Professional liability</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** 6/11/2025

**EVALUATOR NAME:** Craig Patterson

**EVALUATOR DEPARTMENT:** D.H.H.S./O.A.D.S.

<b>P-</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"><li>1. P-plan includes quarterly meetings with Dept. over course of contract</li><li>2. P-use of Qualtrics platform included</li><li>3. P-detailed plan includes use of subcontractor to assure 508 compliance</li><li>4. Q-plan provided but lacks detail</li></ul>
<b>B. Required Reports</b>
<ul style="list-style-type: none"><li>1. P- Detailed plan provided</li><li>2. P-Detailed plan provide including use of HCBS-CAHPS survey</li><li>3. P-Plan provided</li></ul>
<b>C. Report Development</b>
<ul style="list-style-type: none"><li>1. P-plan provided but brief- plan includes use of project management software</li><li>2. P-plan provided, but brief</li><li>3. P- Plan includes use of Zoom, CART captioning, focus groups</li><li>4. Q-very brief outline of a plan?</li><li>5. P-plan provided</li><li>6. P-plan provided but brief</li><li>7. ?-provided plan but short time frame for OADS review (2 weeks)?</li><li>8. P-plan provided – training on confidentiality for all staff, explicit consent from Department required prior to release.</li><li>9. P-plan provided</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>a. P-provided</li><li>b. P-plan provided involving, MCS and Allyant</li><li>c. P-provided detailed staffing plan which includes a timeline chart for activities</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>a. Q-very detailed charts and timelines but no narrative?</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** June 11, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• States they have decades of experience in LTSS</li><li>• Cutler Institute is the research arm of USM and combined extensive applied research and technical profile.</li><li>• Nationally recognized work in the following areas: population health, disability and aging, child and family policy, economic and workforce development, environmental and social resilience and justice policy.</li><li>• Has access to strong range of resources within university system including libraries, business services, telecommunications and information and technology services</li><li>• Offers will service survey research capabilities including design, sampling, and online surveys</li><li>• Experience in completing and publishing several Maine legislative reports</li><li>• Has supported state aging and disability program managers in Maine and nationally for decades</li><li>• Provided 3 relevant research projects which all highlight experience with relevant population, communication and data analysis withing scope of this RFP</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Two subcontractors- Allyant for 508 compliance and Catherin McGuire for consultation</li></ul>	
<b>3. Project Team Organizational Chart</b>	
<ul style="list-style-type: none"><li>• met</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• 3 ; 2 settled (Negligence under Me Tort Claims Act) ; 1 ongoing (first amendment retaliation</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• 22, 23, 24</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• Met. includes professional liability</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

**RFP TITLE:** Research and Reporting of ADS

**BIDDER NAME:** University of Southern Maine

**DATE:** June 11, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ol style="list-style-type: none"><li>1. Bidder reports they will offer well designed and accessible reports to enable ODS to communicate with legislative officials and the public to facilitate support for funding and infrastructure<ul style="list-style-type: none"><li>• Will use department and national and publicly sourced comparative data. Bidder cites data examples that may be used and demonstrates understanding of available department data and program rules</li></ul></li><li>2. Will work with department to plan options for engagement through virtual and in person meetings, public events and surveys<ul style="list-style-type: none"><li>• bidder will design engagement materials and facilitate focus group discussions and document each event.</li><li>• Surveys will be conducted using Qualtrics platform</li></ul></li><li>3. Met</li><li>4. met</li></ol>
B. Required Reports
<ol style="list-style-type: none"><li>1. Bidder demonstrates robust understanding of the programs and systems to be included in the LTSS report.<ul style="list-style-type: none"><li>• Bidder provides detailed description of how data will be structured</li><li>• Bidder clearly identifies data sources to be used for report analysis</li></ul></li><li>2. Bidder demonstrates robust understanding of the programs and systems to be included in the DD reports.<ul style="list-style-type: none"><li>• Bidder provides detailed description of how data will be structured</li></ul></li><li>3. Bidder clearly identifies data sources to be used for report analysis</li><li>4. Bidder demonstrates robust understanding of the programs and systems to be included in the aps reports.<ul style="list-style-type: none"><li>• Bidder provides detailed description of how data will be structured</li><li>• Bidder clearly identifies data sources to be used for report analysis</li></ul></li></ol>
C. Report Development
<ol style="list-style-type: none"><li>1. met</li><li>2. met</li></ol>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202503044

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**DATE:** June 11, 2025

**EVALUATOR NAME:** Nicole Rooney

**EVALUATOR DEPARTMENT:** DHHS-OADS

3. bidder recognizes need for multi pronged approach to gather data and stakeholder feedback. Bidder will facilitate activities, develop materials, document and assist in discussion and feedback	
<ul style="list-style-type: none"><li>• bidder suggests use of focus group participants will receive \$50 honoraria gift cards for their time</li><li>• Events will be transcribed and accessible</li></ul>	
4. Team includes graphic design experts in data visualization strategies. Will suggest key data points for display and infographics, charts and data tables	
5. Bidder reports they will need timely access to data to meet legislative deadlines	
<ul style="list-style-type: none"><li>• Will work with oads single point of contact to request data needed, will follow secure data file transfer</li><li>• Will clearly describe the data required for each report and establish timelines</li></ul>	
6. met	
7. met. drafts will be submitted 2 weeks in advance for review.	
8. Staff have annual training on confidentiality and protected information and protected information	
9. met	
<b>2. Staffing</b>	
a. Met	
b. met	
c. met	
<b>3. Implementation - Work Plan</b>	
a. met	



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

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202503044**

**RFP TITLE: Research and Reporting on Aging and Disability Services**

I, Jessica Benson Yang, 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.**

Signed by:

*Jessica Benson Yang*

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Jul-01-2025

**Signature**

**Date**



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

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202503044**

**RFP TITLE: Research and Reporting on Aging and Disability Services**

I, Doreen McDaniel, 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.**

Signed by:

*Doreen McDaniel*

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Jul-01-2025

**Signature**

**Date**



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

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202503044**

**RFP TITLE: Research and Reporting on Aging and Disability Services**

I, Noelle Neault, 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.**

Signed by:

*Noelle Neault*

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Jul-01-2025

**Signature**

**Date**



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

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202503044**

**RFP TITLE: Research and Reporting on Aging and Disability Services**

I, Craig Patterson, 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.**

Signed by:

*Craig Patterson*

9F7C071059E846A...

Jul-01-2025

**Signature**

**Date**



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

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202503044**

**RFP TITLE: Research and Reporting on Aging and Disability Services**

I, Nicole Rooney, 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.**

Signed by:

*Nicole Rooney*  
FC98BC7615C7498...

Jul-01-2025

**Signature**

**Date**