

State of Maine
Master Score Sheet

RFP# 202311236			
HIV Case Management			
Bidder Name:		Androscoggin Home Health Services, Inc	Frannie Peabody Center
Proposed Cost:		\$477,073.00	\$455,130.00
Scoring Sections	Points Available		
Section I: Preliminary Information	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	20.00	17.00	20.00
Section III: Proposed Services	50.00	25.00	42.00
Section IV: Cost Proposal			
a. Cost Proposal	<i>25.00</i>	<i>23.85</i>	<i>25.00</i>
b. Budget Narrative	<i>5.00</i>	<i>4.00</i>	<i>5.00</i>
Section IV Total	30.00	27.85	30.00
TOTAL	<u>100.00</u>	<u>69.85</u>	<u>92.00</u>

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



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

Award Justification Statement RFP# 202311236, HIV Case Management

I. Summary

Through RFP# 202311236, the Department sought proposals for HIV Case Management. Two (2) Bidders responded: Androscoggin Home Health Services and Frannie Peabody Center. Through the evaluation process, Frannie Peabody Center was the highest scoring Bidder and determined to provide the best value to the State of Maine.

II. Evaluation Process

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

III. Qualifications & Experience for Frannie Peabody Center

- The current statewide provider of Ryan White Part B case management services since 2014.
- Has an extensive history specifically serving people living with HIV since 1985.

IV. Proposed Services for Frannie Peabody Center

- Has eight (8) HIV case managers who serve 260+ people living with HIV/AIDS primarily in Districts 1 and 2 where the majority of PLWHA in Maine reside and the ability to provide case management services to other districts through subcontracting agreements.

V. Cost

Frannie Peabody Center proposed the lowest cost of \$455,130.00.


VI. Conclusion

Out of 100 possible points, Frannie Peabody Center scored 92.00, which was the highest point total awarded by the Evaluation Team. The strengths of Frannie Peabody Center's proposal include a strong organization with relevant experience, a complete proposed scope of service, and a competitive cost proposal. The Evaluation Team has determined the proposal submitted by Frannie Peabody Center represents the best value to the State of Maine.

APPENDIX Q

State of Maine
Department of Health and Human Services
Maine Center for Disease Control and Prevention
NOTICE OF INTENT TO BID FORM
RFP# 202311236
HIV Case Management

Bidder's Organization Name:	Androscoggin Home Health Services, Inc (legal)		
Chief Executive - Name/Title:	Kenneth, Albert, RN, Esq, CEO/President		
Tel:	207-777-7740	E-mail:	Ken.ablert@androscoggin.org
Headquarters Street Address:	15 Strawberry Ave		
Headquarters City/State/Zip:	Lewiston, ME 04240		
<i>(Provide information requested below if different from above)</i>			
Lead Point of Contact for Proposal - Name/Title:	Kari Grant-Gagnon, Grant Writer		
Tel:	207-402-0215	E-mail:	Kari.grant-gagnon@androscoggin.org
Street Address:	15 Strawberry Ave		
City/State/Zip:	Lewiston, ME 04240		

Signature of person authorized to enter into the contract with the Department:	
Name (Print): Kenneth Albert, RN, Esq	Title: CEO/President
Authorized Signature: 	Date: 11/11/2024

<p>Provide a brief description of the Bidder's experience and ability to perform the work required within this RFP.</p> <p>Androscoggin has grown to become the largest non-profit, independent home health agency in Maine and one of the largest in New England. With over 650 employees and 150 volunteers; serving over 12,000 patients and their families in 2023. Androscoggin serves residents across Maine's sixteen counties.</p> <p>Androscoggin serves patients, clients, and families of all ages, races, and socio-economic statuses, some may be taking their first breath, others their last, by offering a broad array of services, including: home health, hospice, palliative care, behavioral health, community care team (transitional care and HOME – intensive), telehealth, and personal support services.</p> <p>Since 2012, Androscoggin has worked with the State of Maine to provide Community Care Team (CCT) services to underserved, medically complex, and high-risk Medicaid patients across Maine. Androscoggin's CCT operates with an interdisciplinary team to help patients manage their chronic disease or health condition, partnering with the patient (and oftentimes their family) to set goals of care and develop strategies to manage and improve the patient's overall health and wellness. Case managers provide disease/condition specific education, as well as care coordination, resource connectivity,</p>
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education on appropriate use of the healthcare system, and addressing barriers created by social determinants of health—which are playing an increasingly large role in patients’ overall health and quality of life. Today, the program maintains its core mission and has placed an increased emphasis on social determinants of health and social supports (e.g. housing and employment supports).

Androscoggin’s extensive experience providing care to patients in their home and the community drove the model we continue in CCT today—meeting patients where they are in their healthcare journey whether it be a new diagnosis or an poorly managed disease, meeting them in person preferably at their home (at least once), provided greater insight into the challenges they were facing that impacted their overall health and quality of life. Each patient is unique, driving their care plan and service delivery to be customizable.

While CCT is a very specific example of case management, and not identical to the HIV/AIDS case management program, it speaks to the preparedness of this team and Androscoggin’s clinicians across all service lines being well-versed in case managing medically complex patients. Patients are typically admitted to Androscoggin at a critical point in their healthcare journey; requiring additional oversight and support in coordinating care to ensure patients get the right care at the right time—prioritizing safety, timeliness of care, continuity of care, efficiency, equitable access, and a patient-centered approach. Additionally, Androscoggin’s clinicians are accustomed to providing collaborative care—partnering internally with nurses, social workers, community health workers (and more) and externally with referral partners and community resources (e.g. social services) to ensure patient/client needs are addressed and they are set up for success.


Looking beyond the care component of this RFP, we would be remiss not speak to Androscoggin’s logistical experience including: reporting (templates and deadlines), collecting patient/client feedback, maintaining quality programs, billing, and patient/client documentation. These logistical components across all of our programs allow us to continue to provide care to our community members in need, while remaining operationally sustainable.

Notably, Androscoggin is accustomed to meeting scheduled reporting needs using provided templates (whether a grant or contract). Our Accounting software (BlackBaud-Financial Edge) tracks program specific revenues and expenses, efficiently tracking program utilization and growth. Androscoggin operates programs that have strict conditions of participation and compliance measures, all of which are monitored through our robust quality program. Additionally, Androscoggin regularly collects feedback from patients and clients through satisfaction surveys and letters soliciting feedback and we understand formal channels are not the only way to receive feedback. Patients and clients are encouraged to share feedback with their clinician and/or outreach our office with feedback (and staff direct the call based on the feedback).

CCT is but one spoke in the hub of care for patients—helping to create seamless transitions across the continuum of care. Similarly, HIV/AIDS case management will be another spoke in the hub of care for clients, leveraging skills that our clinicians use daily to provide comprehensive care to medically complex patients/clients. We hope to be given the opportunity to provide a robust continuum of care to clients across the five districts, meeting them where they are by providing individualized HIV/AIDS case management.

State of Maine
Department of Health and Human Services
Maine Center for Disease Control and Prevention
NOTICE OF INTENT TO BID FORM
RFP# 202311236
HIV Case Management

Bidder's Organization Name:	Frannie Peabody Center		
Chief Executive - Name/Title:	Katie Rutherford		
Tel:	207-619-8013	E-mail:	krutherford@peabodycenter.org
Headquarters Street Address:	30 Danforth St. Suite 309		
Headquarters City/State/Zip:	Portland, ME 04101		
<i>(Provide information requested below if different from above)</i>			
Lead Point of Contact for Proposal - Name/Title:	Katie Rutherford		
Tel:	207-619-8013	E-mail:	krutherford@peabodycenter.org
Street Address:	30 Danforth St. Suite 309		
City/State/Zip:	Portland, ME 04101		

Signature of person authorized to enter into the contract with the Department:	
Name (Print): Katie Rutherford	Title: Executive Director
Authorized Signature: 	Date: 12/20/2023

Provide a brief description of the Bidder's experience and ability to perform the work required within this RFP.
<p>Frannie Peabody Center (FPC) is Maine's oldest and largest community-based HIV/AIDS services organization, providing comprehensive services through prevention, HIV case management, and federally funded housing assistance for people living with HIV/AIDS. FPC has been the sole contracted provider of Ryan White Part B case management services since 2014. Annually, FPC provides direct services for over 400 people living with HIV/AIDS, performs over 500 HIV and/or Hepatitis C tests, and has distributed over 1,400 HIV self-test kits over the past 14 months. Our services provide support across the full HIV care continuum, from diagnosis and linkage to care, to ongoing monitoring and engagement through HIV viral load suppression.</p>

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



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11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
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Feb-15-2024

Via Electronic Mail: Kari.grant-gagnon@androscoggin.org

Androscoggin Home Health Services, Inc.
Kari Grant-Gagnon, Grant Writer
15 Strawberry Avenue
Lewiston, ME 04240

SUBJECT: Notice of Conditional Contract Award under RFP #202311236 HIV Case Management

Dear Kari Grant-Gagnon,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

- Frannie Peabody Center

Frannie Peabody Center received the evaluation team's highest ranking. The Department will be contacting Frannie Peabody Center 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 Frannie Peabody Center. Frannie Peabody Center shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

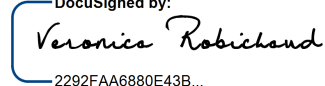
As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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

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

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

Sincerely,

DocuSigned by:

2292FAA6880E43B...

Veronica Robichaud
Chief Operating Officer
Maine Center for Disease Control and Prevention

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



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

Feb-15-2024

Via Electronic Mail: krutherford@peabodycenter.org

Frannie Peabody Center
Katie Rutherford, Executive Director
30 Danforth Street, Suite 309
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award under RFP #202311236 HIV Case Management

Dear Katie Rutherford,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

- Frannie Peabody Center

Frannie Peabody Center received the evaluation team's highest ranking. The Department will be contacting Frannie Peabody Center 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 Frannie Peabody Center. Frannie Peabody Center shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

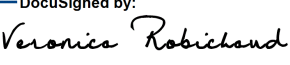
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

2292FAA6880E43B...

Veronica Robichaud
Chief Operating Officer
Maine Center for Disease Control and Prevention

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Androscoggin Home Health Services, Inc.

DATE: February 6, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Carolina Rojas-Becerra, Tara Thomas, and Emily Bean

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	20.00	17.00
Section III. Proposed Services	50.00	25.00
Section IV. Cost Proposal		
a. Cost Proposal	25.00	23.85
b. Budget Narrative	5.00	4.00
Section IV. Total	30.00	27.85
<u>Total Points</u>	<u>100.00</u>	<u>69.85</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Androscoggin Home Health Services, Inc.

DATE: February 6, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Androscoggin Home Health Services, Inc.

DATE: February 6, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	20.00	17.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Provided three (3) project examples of low income underserved clients.• Project One seems similar to RWB Case Management.• Project Two describes experience with housing insecurity.• Serves residents across all 16 counties.• Has previous contract experience with the State of Maine.• Established in 1996.• Served 12,000 patients in 2023.
2. Subcontractors
<ul style="list-style-type: none">• Plan to utilize five (5) subcontractors.<ul style="list-style-type: none">○ Three (3) language interpreters.○ One (1) sign language interpreter.○ One (1) after hours support to clients.
3. Organizational Chart
<ul style="list-style-type: none">• Met the requirements.
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• Provided adequate historical financial statements.• Provided corrective action plan for audit findings for 2021.• The team has no concerns at this time.
6. Certificate of Insurance
<ul style="list-style-type: none">• Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Androscoggin Home Health Services, Inc.

DATE: February 6, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50.00	25.00

Evaluation Team Comments:

Part IV, Section III Proposed Services

1. Services to be Provided

Part II

A. General Requirements

- Proposes a total of 1.5 FTE nurses/social workers to provide this service.
- Did not acknowledge the PHDs to be served in Table 1.
- Plans to utilize gas cards for towns without public transportation.
- Response to compliance with all applicable standards related to Case Management services was minimally responsive.
- Response to cooperating with routine federal monitoring and any federal investigation regarding the Case Management services was minimally responsive.
- Provided a detailed response to complying with all language access and effective communication requirements.
- Plans to allow friend/family to serve as interpreter and continue to offer interpretation services.
- Plans to support the client in identifying and removing barriers to participation (e.g., transportation, language, etc.).
- Billing experts could program a sequence into MatrixCare to ensure Ryan White is payer of last resort.
- Proposes to utilize MatrixCare and CAREWare.
- Response to executing written referral agreements with local service providers and organizations to ensure new Clients may be referred and have access to Case Management was minimally responsive.
- Will establish an advisory board that meets quarterly.
- A bi-annual survey will be administered to a random sample of clients.
- Plans to utilize an email address specific for providing feedback.
- Response to establishing a Clinical Quality Management Program in compliance with HRSA HIV/AIDS Bureau Policy Clarification Notice 15-02 was minimally responsive.
- Did not address participating in quarterly meetings with Department related to performance measurement and quality improvement.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Androscoggin Home Health Services, Inc.

DATE: February 6, 2024

- Response to ensuring Case Managers spend at least twenty (20) hours per week per FTE on direct Client service (face-to-face contact, Collateral Contact, and/or non-face-to-face contact and travel to and from Client appointments) was minimally responsive.
- Has an established and aggressive system for ensuring Payer of Last Resort/screening for MaineCare eligibility.

B. Client Eligibility

- Met the requirements.

C. Case Management Service Delivery

- Did not address how activities would be client centered or the specifics of visits being face-to-face versus virtual versus phone.
- Matrix will allow staff to schedule visits (even a year in advance). CAREWare reports will validate contact compliance.
- Ryan White Part B application will be submitted within 24 hours of comprehensive assessment visit.

D. Medical Transportation Assistance

- Met the requirements.

E. Discharge Requirements

- Plans to develop a discharge policy upon award.
- Response to providing copies of the discharge summary and/or any other records requested by the Client within fifteen (15) calendar days, and in accordance with appropriate confidentiality laws, including the HIPAA was minimally responsive.

F. Case Management Documentation Requirements

- Response to developing and maintaining a file for each client was minimally responsive.
- Proposed option to utilize CAREWare as well as Electronic Health Records (EHR) indicating a reliance on EHR.
- Provided a thorough response indicating expertise in data systems and reporting.

G. Confidentiality of Client Information

- Met requirements.

H. Fiscal Requirements

- Met requirements.

I. Staffing Requirements

- Provided a thorough response to developing and executing a staff training plan.

J. Policy Requirements

- Some policies provided are overdue for updates per the Bidders schedule.

K. Performance Measures

- Met the requirements.

L. Reports

- Met the requirements.

2. Staffing

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Androscoggin Home Health Services, Inc.

DATE: February 6, 2024

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| <ul style="list-style-type: none">• It is unclear if the number of proposed FTEs (1.75 FTE nurse/social work) is sufficient to deliver quality services to the number of clients/regions required.• The number of FTEs for direct services does not match what was proposed in Part II A. General Requirements. |
|--|

3. Implementation - Work Plan
<ul style="list-style-type: none">• Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Androscoggin Home Health Services, Inc.

DATE: February 6, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal		
a. Cost Proposal	25.00	23.85
b. Budget Narrative	5.00	4.00
Section IV Total	30.00	27.85

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$455,130.00	÷	\$477,073.00	x	25.00 points	=	23.85

Evaluation Team Comments:

- Provided limited details for a Marketing (Miscellaneous) expense of \$5,000 in the Budget Narrative.
- Form 2 Expense Summary for Line 19 “Materials/Supplies” and Line 31 “Miscellaneous” were grouped in the Budget Narrative in three (3) separate categories; “Client Services”, “Marketing” and “Rental Space” making it difficult to align the costs in the Budget Narrative with the expenses listed on Form 2.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Frannie Peabody Center

DATE: February 6, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Robert Chicoria, Carolina Rojas-Becerra, Tara Thomas, and Emily Bean

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Frannie Peabody Center

DATE: February 6, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Frannie Peabody Center

DATE: February 6, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	20.00	20.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Provided three (3) project examples all relevant to providing HIV services.• Has been the statewide provider of Ryan White Part B case management services since 2014.• Has an extensive history specifically serving people living with HIV since 1985.• Operates a housing program specifically for people living with HIV for over 25 years.• Three (3) current staff members maintain Maine CDC HIV and Hepatitis C testing certification.• Leadership serves on State and National HIV advisory boards.• Largest community-based organization serving People Living with HIV/AIDS (PLWHA) in Maine.• Serves a diverse set of needs among Maine's vulnerable populations including immigrants and refugees in Portland.
2. Subcontractors
<ul style="list-style-type: none">• Currently supporting a new provider as a potential subcontractor for Ryan White Part B case management services.
3. Organizational Chart
<ul style="list-style-type: none">• Met the requirements.
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• Appear to be financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none">• Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Frannie Peabody Center

DATE: February 6, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50.00	42.00

Evaluation Team Comments:

Part IV, Section III Proposed Services

1. Services to be Provided

Part II

A. General Requirements

- Current team of eight (8) HIV case managers who serve 260+ people living with HIV/AIDS primarily in Districts 1 and 2 where the majority of PLWHA in Maine reside.
- Demonstrates the ability to deliver Ryan White Part B case management services in other districts through subcontracting agreements.
- Demonstrates an understanding of Ryan White HIV/AIDS Program policies and CAREWare use.
- Currently employs a bilingual case manager.
- Will provide printed materials related to care available in multiple languages.
- Currently holds a memorandum of agreement with Stratus Audio, an independent certified medical interpreting service. This interpreting service supports clients who experience stigma and may prefer a third-party out-of-state interpreter to protect confidentiality.
- Executive Director currently serves as MeHAAB's provider co-chair.
- Names specific relevant providers with 14 executed memoranda of agreement and willing to establish more as appropriate.
- Referral Packet for Outside Providers is accessible directly on Bidder's website.
- Provided a thorough response to developing and maintaining a plan for communicating information.
- Anonymous client suggestion box in the waiting area.
- Client survey (offered in seven languages).
- Monthly support group.
- Has Grievance Policy.
- Coordinates interviews with clients for Maine's Integrated HIV Prevention and Care Plan.
- Provided a thorough response to determining if Clients have private or public health insurance prior to providing Case Management service.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

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B. Client Eligibility
<ul style="list-style-type: none">• Provided a thorough response to Client eligibility determination.
C. Case Management Service Delivery
<ul style="list-style-type: none">• Provided a thorough response to ensuring Case Management activities are Client-centered and include face-to-face encounters, virtual contact, phone contact, and Collateral Contacts to service providers and/or family members.• Plans to continue to offer alternate communication methods to clients with increased confidentiality concerns.• Provided a thorough response to completing in-person Comprehensive Assessments.• Provided a thorough response to referral and monitoring services.
D. Medical Transportation Assistance
<ul style="list-style-type: none">• Business Associate Agreement (BAA) with Lyft Healthcare.• Plans to Provide gas cards and bus passes.
E. Discharge Requirements
<ul style="list-style-type: none">• Met requirement.
F. Case Management Documentation Requirements
<ul style="list-style-type: none">• Provided a thorough response to ensuring relevant and appropriate staff have access to CAREWare.• Provided a thorough response to utilizing CAREWare to run reports and monitor services.• Case Management Support Team consists of 5 individuals. Each individual is responsible for auditing one chart at the weekly meeting (consist of both MaineCare and RW charts).• Program Data Manager is responsible for randomly choosing charts ensuring the quantity of Ryan White Part B case management client charts meet the 10% required auditing.
G. Confidentiality of Client Information
<ul style="list-style-type: none">• All staff members receive mandatory comprehensive HIPAA training at orientation and annually.• Case Managers are trained on obtaining and documenting informed consent for transmitting or discussing PHI.• Visitors and vendors entering the office sign confidentiality agreements in addition to maintaining BAAs and MOAs as appropriate.• Systems Engineering (SE) provides integrated IT and cybersecurity services.• Has agreements with vendors for providing confidential destruction services for technology hardware and paperwork.• Case managers are trained on protocols related to reporting any risk of or accidental disclosure.
H. Fiscal Requirements
<ul style="list-style-type: none">• Demonstrated understanding of the policy and provides support to partner providers.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Frannie Peabody Center

DATE: February 6, 2024

I. Staffing Requirements
<ul style="list-style-type: none">• Eight (8) case managers and clinical supervisor currently on staff have a combined 50 years of experience delivering case management services at this agency.• Provided a thorough training plan.
J. Policy Requirements
<ul style="list-style-type: none">• Met requirements.
K. Performance Measures
<ul style="list-style-type: none">• Met requirements.
L. Reports
<ul style="list-style-type: none">• Met requirements.
2. Staffing
<ul style="list-style-type: none">• Stated that if no appropriate subcontractors exist, Bidder is prepared to expand its capacity through hiring.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER: Frannie Peabody Center

DATE: February 6, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal		
a. Cost Proposal	25.00	25.00
b. Budget Narrative	5.00	5.00
Section IV Total	30.00	30.00

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$455,130.00	÷	\$455,130.00	x	25.00 points	=	25.00

Evaluation Team Comments:

- Provided a detailed budget narrative.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: MaineCare, Care Coordination Unit

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P - Established in 1996• P - Largest non-profit, independent home health agency in Maine• P - Serves residents across all 16 counties• P - Currently offers Section 13, TCM
2. Subcontractors
<ul style="list-style-type: none">• They intend to use subcontractors (both in and out of state) for telephonic interpretation, American Sign Language, and ambulance services.
3. Organizational Chart
<ul style="list-style-type: none">• Met requirements
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• Provided corrective action plan for audit findings.• Significant deficiency not noted as a material weaknesses.• Provided adequate historical financial statements.
6. Certificate of Insurance
<ul style="list-style-type: none">• Certificate of liability insurance was provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: MaineCare, Care Coordination Unit

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
	<ul style="list-style-type: none"> • I – If awarded will be embedded in current Community Care Team (CCT) • N – Concern about if awarded additional nurse from St. Mary's being hired. • Q – No information provided about covering the specific geographic districts listed in RFP.
	<ul style="list-style-type: none"> • Met requirements.
	<ul style="list-style-type: none"> • Met requirements.
	<ul style="list-style-type: none"> • Standards will be on file for reference and may be integrated into quarterly audits.
	<ul style="list-style-type: none"> • Quality Department and Director of Compliance are used to routine federal monitoring and federal surveys.
	<ul style="list-style-type: none"> • Met requirements. • Will allow friend or family to interpret.
	<ul style="list-style-type: none"> • Met requirements. • Bidder will support the client in identifying and removing barriers to participation (e.g. transportation, language, etc.)
	<ul style="list-style-type: none"> • Uses MatrixCare and CAREWare if desired. • Billing experts could program a sequence into MatrixCare to ensure Ryan White is payer of last resort.
	<ul style="list-style-type: none"> • Will secure formal agreements with the key service providers, listed above. Specific examples were not provided.
	<ul style="list-style-type: none"> • Case managers will capture clients preferred method of communication and desired frequency. • Quarterly client newsletter- upcoming internal and external events, information on resources (heat), social media strategy and innovative ways to connect with clients in their preferred method. • Communications targeted to key referral partners (e.g. infectious disease providers, primary care providers, STD clinics, etc.) and already existing partners (e.g. social services and STD clinics) and shared in newsletters, social media, website and annual community benefit report. • Meet clients where they are on their health journey
	<ul style="list-style-type: none"> • Will establish an advisory board that meets quarterly.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: MaineCare, Care Coordination Unit

<ul style="list-style-type: none">• To ensure safe and productive environment a policy for advisory board will be developed. Policy will address confidentiality, conduct and criteria for dismissal.• A bi-annual survey will be administered to a random sample of clients.• Email address specific for feedback.
<ul style="list-style-type: none">• All service lines existing currently have a Quality Committee• Not typical to include patients'/clients but are not opposed when appropriate as they provide a unique perspective regarding needs being met.• No specific mention of the Departments quarterly meetings.
<ul style="list-style-type: none">• Plan to exceed this requirement.
<ul style="list-style-type: none">• MatrixCare automatically runs eligibility checks for MaineCare once a week for all patients and clients.• Use MaineCare portal to learn of the loss of MaineCare coverage.• If no insurance, Case Manager will incorporate securing insurance into the care plan.• ADAP applications will be initiated right away.• Case Managers will also help with free care applications.• Billing Department can create rules within MatrixCare to ensure the Department is the payor of last resort (a similar rule is currently in place to ensure MaineCare is the payor of last resort).
B. Client Eligibility
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Met Requirement.
C. Case Management Service Delivery
<ul style="list-style-type: none">• Matrix will allow staff to schedule visits (even a year in advance). CAREWare reports will validate contact compliance.• Bidder didn't address how activities would be client centered or the specifics of visits being face-to-face versus virtual versus phone.
<ul style="list-style-type: none">• With permission would like to program all forms into HIPAA complaint system, Link. This allows for client signature.• Case managers will have all completed documentation submitted within 24 hours of the visit.• Materials that need Dept review will be sent 30 days prior to allow ample review time.
<ul style="list-style-type: none">• Case managers write goals in SMART• It is likely care plan will be updated more frequently (then requirement of semi-annually)

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: MaineCare, Care Coordination Unit

<ul style="list-style-type: none"> • Link system will allow the case manager to email the client the form for signature.
<ul style="list-style-type: none"> • Met requirement.
D. Medical Transportation Assistance
<ul style="list-style-type: none"> • Regularly applies for grant funding. • Small amount of the annual budget is dedicated to client transportation.
<ul style="list-style-type: none"> • Met requirement.
E. Discharge Requirements
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
F. Case Management Documentation Requirements
<ul style="list-style-type: none"> • CAREWare and MatrixCare will be used.
<ul style="list-style-type: none"> • Agency has a Retention of Records policy they will share with Dept
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Hyperlink on each staff members desktop or iPad will be created.
<ul style="list-style-type: none"> • Agency has own requirement that documentation is completed within 24 hours of service delivery
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
G. Confidentiality of Client Information
<ul style="list-style-type: none"> • Can restrict access to PHI based on the staff's role. • Heightened restrictions due to their confidential nature
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Have Breach Notification of PHI and Reporting Privacy Violations, Mitigation and Sanctions policies.
H. Fiscal Requirements
<ul style="list-style-type: none"> • Currently, the Finance Department has a clear policy and workflow for grant or program specific funds.
<ul style="list-style-type: none"> • Already a MaineCare provider.
<ul style="list-style-type: none"> • If awarded will establish rules in MatrixCare's billing module that 'force' a payer to be the last payer. • Education to case managers • Part of random chart audits
I. Staffing Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: MaineCare, Care Coordination Unit

<ul style="list-style-type: none">• Mention of previous case manager from St. Mary's being hired.
<ul style="list-style-type: none">• Will complete introductory trainings by the end of April 2024.• Clinical Manager will monitor that staff attend required trainings.• Trainings will be recorded by Human Resources.
J. Policy Requirements
<ul style="list-style-type: none">• Met requirement.• Employees must sign HIPAA HITECH Training and Confidentiality Acknowledgement form.• Bidder did not speak to actions taken in the event of a suspected or actual breach of confidential information.
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Uses PolicyTech to store policies. Platform will also send reminder emails when a policy is up for review.
K. Performance Measures
<ul style="list-style-type: none">• Will incorporate CAREWare reports and quarterly record reviews into the monthly HACM Quality Committee meetings.
L. Reports
<ul style="list-style-type: none">• Bidder will develop a reporting plan to track and report the measures.
<ul style="list-style-type: none">• Bidder will develop a reporting plan, including a detailed schedule, to track and report all measures required by the Department.• Reports will also be reviewed at monthly Quality Committee for additional compliance and accountability.
2. Staffing
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Subcontractors used in two ways: interpreters for non-English speaking or deaf/hard of hearing clients and for after-hours client triage support.• Bidder didn't address oversight or management of these subcontractors in their answer.
<ul style="list-style-type: none">• Met requirement.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met requirement.

Part IV, Section IV. Cost Proposal and Budget Narrative
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: February 02, 2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Cover Page – met requirements.• Debarment Form – met requirements.• Qualifications – met requirements.• Projects – provided 3 related projects, Community Care Team, HOME-Intensive Program, and Mobile Wound Care. All projects provide services to State of Maine low-income underserved patients.
2. Subcontractors
<ul style="list-style-type: none">• 5 subcontracts<ul style="list-style-type: none">○ 3 provide language interpretation services.○ 1 provides sign language interpretation services.○ 1 provides after hours support to clients.
3. Organizational Chart
<ul style="list-style-type: none">• Met requirements• Several openings at the administrative level – not critical to RFP
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• Good
6. Certificate of Insurance
<ul style="list-style-type: none">• Met requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: February 02, 2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">• Will provide services in the Public Health Districts listed above.<ul style="list-style-type: none">○ 1.25 FTE Nurses○ 0.25 FTE Social Work○ 0.10 FTE Admin Support○ 0.20 FTE Leadership oversight○ 1.80 FTE Total• Backup support on an as needed basis
<ul style="list-style-type: none">• a. Monday through Friday 8 am to 5 pm, Six holidays, After hours support available. Case managers notify clients for unexpected closures such as weather. Clients provided with instructions for contacts at any time.• b. Written materials provided at first visit with details.• c. Services can be in-person or virtual.
<ul style="list-style-type: none">• a. Services provided at facility, client's home or mutually agreed setting. Bidders facility(s) fully compliant with ADA and accessible by public transportation.
<ul style="list-style-type: none">• Met requirements
<ul style="list-style-type: none">• Met requirements
<ul style="list-style-type: none">• a. Language and sign language interpreters will be provided.• b. Met requirements.• c. Met requirements.• d. Met requirements.
<ul style="list-style-type: none">• Met requirements.
<ul style="list-style-type: none">• Met requirements.
<ul style="list-style-type: none">• Will extended existing agreement and partner with those facilities without current agreements at contract award.
<ul style="list-style-type: none">• Met requirements.
<ul style="list-style-type: none">• Met requirements.
<ul style="list-style-type: none">• Met requirements.
<ul style="list-style-type: none">• Will meet requirements and add staff as Clients are onboarded.
<ul style="list-style-type: none">• Case manager will collect insurance data prior to billing against the awarded contract. Will assist in completing all forms necessary for MaineCare if applicable/
B. Client Eligibility

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: February 02, 2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

<ul style="list-style-type: none">• Case managers will determine if client is eligible for services by securing proof of diagnosis, State of Maine residency, and proof of gross household income.
<ul style="list-style-type: none">• See B.1. above
C. Case Management Service Delivery
<ul style="list-style-type: none">• Met requirements.
<ul style="list-style-type: none">• a. Will follow State's protocol for virtual written approvals.• b. Met requirements.• c. Met requirements.• d. Met requirements.• e. Met requirements.
<ul style="list-style-type: none">• Met requirements.
<ul style="list-style-type: none">• a. Case Managers will take client needs including referrals into consideration at all contacts.• b. Case Managers will reference the care plan in all contacts.• c. Case Managers will follow up on referrals, lab results and appointments regularly.• d. Q - Case Managers will document all contacts within 24 <u>business</u> hours.• e. Will be tailored to the needs of each client.
D. Medical Transportation Assistance
<ul style="list-style-type: none">• Will use DHHS Non-Emergency Transportation Brokers supplemented with Bus Vouchers etc..
<ul style="list-style-type: none">• Met requirements.
E. Discharge Requirements
<ul style="list-style-type: none">• Will develop a Discharge Policy upon award.
<ul style="list-style-type: none">• Multiple attempts will be made to explaining the discharge to clients.
<ul style="list-style-type: none">• Will be addressed in new Discharge Policy
F. Case Management Documentation Requirements
<ul style="list-style-type: none">• Case managers will create client records in CAREWare.
<ul style="list-style-type: none">• Will share Records Retention Policy with Department upon award.
<ul style="list-style-type: none">• Will submit a list of care team members for Access to CAREWare upon award.
<ul style="list-style-type: none">• IT department will create a hyperlink to the Guidance Manual on all user's desktops.
<ul style="list-style-type: none">• Will be completed within 24 hours of service delivery.
<ul style="list-style-type: none">• Met requirements
<ul style="list-style-type: none">• Met requirements
G. Confidentiality of Client Information
<ul style="list-style-type: none">• Met requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

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EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

• Met requirements
• Met requirements
• Met requirements
• Met requirements
H. Fiscal Requirements
• Met requirements
• Already enrolled as a MaineCare provider.
• Met requirements
I. Staffing Requirements
• Met requirements
• Met requirements
J. Policy Requirements
• Met requirements
• Will develop Policy
• Will meet requirements.
• I – Some existing policies are overdue for updates.
K. Performance Measures
• Met requirements.
L. Reports
• Met requirements.
• Met requirements
2. Staffing
• Met requirements
• Met requirements
• Met requirements
3. Implementation - Work Plan
• Met requirements.
Part IV, Section IV. Cost Proposal and Budget Narrative
• 477,073 Total Cost
• Budget Narrative provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS CDC

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• I- Have contracted with State of Maine in the past• I- Served 12,000 patients in 2023
2. Subcontractors
<ul style="list-style-type: none">• P-Subcontract to offer various interpretation services• I- Subcontract to provide after-hours coverage
3. Organizational Chart
<ul style="list-style-type: none">• Meets requirements
4. Litigation
<ul style="list-style-type: none">• P- No lawsuits noted
5. Financial Viability
<ul style="list-style-type: none">• Q-Submitted Corrective action plan for 2021
6. Certificate of Insurance
<ul style="list-style-type: none">• Insurance certificate included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS CDC

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
	<ul style="list-style-type: none"> • P- Provide services across all 16 Maine counties
	<ul style="list-style-type: none"> • Subcontract to provide after-hours services
	<ul style="list-style-type: none"> • P- Use gas cards and volunteer services in towns without public transportation
	<ul style="list-style-type: none"> • Bidder meets requirements
	<ul style="list-style-type: none"> • Bidder meets requirement
	<ul style="list-style-type: none"> • I- Allow friend/family to serve as interpreter and continue to offer interpretation services
	<ul style="list-style-type: none"> • P- Will work with client to remove barriers to participation
	<ul style="list-style-type: none"> • Bidder meets requirements
	<ul style="list-style-type: none"> • P- Will establish new formal agreements to support existing agreements and diminish service gaps
	<ul style="list-style-type: none"> • P- Quarterly newsletter for clients
	<ul style="list-style-type: none"> • I- Email address for client feedback
	<ul style="list-style-type: none"> • P- Bi-annual survey and will implement advisory board
	<ul style="list-style-type: none"> • I- Currently do not include HIV program clients, but willing to do so
	<ul style="list-style-type: none"> • Bidder meets requirement
	<ul style="list-style-type: none"> • Bidder meets requirement
B. Client Eligibility	
	<ul style="list-style-type: none"> • P- Case managers meet with client within 14 days of initial referral
	<ul style="list-style-type: none"> • I- Use of Ryan White Part B application to guide acceptable proof of Maine residency and gross household income
C. Case Management Service Delivery	
	<ul style="list-style-type: none"> • I- Have technology to ensure at minimum quarterly contact
	<ul style="list-style-type: none"> • P- Ryan White Part B application will be submitted within 24 hours of comprehensive assessment visit
	<ul style="list-style-type: none"> • Q- Use of Link platform
	<ul style="list-style-type: none"> • I- Prevention discussion will be different for each client as it is tailored to their unique needs
D. Medical Transportation Assistance	
	<ul style="list-style-type: none"> • P- Take special accommodations into account when providing transportation assistance
	<ul style="list-style-type: none"> • P- Budget for client transportation
	<ul style="list-style-type: none"> • Bidder meets requirement

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS CDC

E. Discharge Requirements
• Bidder meets requirement
• P- Discharged client provided with grievance policy
• Bidder meets requirement
F. Case Management Documentation Requirements
• Bidder meets requirements
• I- Has "Retention of Records" policy
• P- Policies for secure use of portal
• Bidder meets requirement
• P- Staff will enter information within 24 hours of service delivery
• I- Leadership will monitor program to ensure compliance
• Q- Androscoggin Quality Department will develop an audit for HACM
G. Confidentiality of Client Information
• P- Only staff engaged in direct client care has access to full client information
• Bidder meets requirement
• P- Have legal counsel
• Bidder meets requirement
• Bidder meets requirement
H. Fiscal Requirements
• P-Have policy and workflow established
• P-Already enrolled as MaineCare provider
• Will establish policy and use their billing system to ensure this requirement
• Service based on client's autonomy level
I. Staffing Requirements
• Have two case managers with at least 7 years of experience
• Human Resources monitors individual licenses
• Q- Unsure about plan for new case managers that might be hired in the future
J. Policy Requirements
• Bidder meets requirement
• Will adopt Department's policy
• I- Use of PolicyTech to meet requirement
K. Performance Measures
• P- HACM Quality Committee will review reports to ensure desired outcomes
L. Reports
• Bidder meets requirement
• P-Will develop reporting plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 1/31/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS CDC

<ul style="list-style-type: none">• Will use HACM Quality Committee
2. Staffing
<ul style="list-style-type: none">• Bidder meets requirement
<ul style="list-style-type: none">• P- Subcontractors will allow for interpretation and after-hours services
<ul style="list-style-type: none">• I-Vacant position to be hired, have identified potential personnel• P-Have back up staffing plan
3. Implementation - Work Plan
<ul style="list-style-type: none">• Bidder meets requirement

Part IV, Section IV. Cost Proposal and Budget Narrative
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 2/1/24

EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none">• P – Project One seems similar to RWB Case Management• P – Project Two describes experience with housing insecurity	
2. Subcontractors	
<ul style="list-style-type: none">• P- has multiple subcontractors for interpretation services	
3. Organizational Chart	
<ul style="list-style-type: none">• Document provided – no comments	
4. Litigation	
<ul style="list-style-type: none">• None identified	
5. Financial Viability	
<ul style="list-style-type: none">• Audits provided - no comments	
6. Certificate of Insurance	
<ul style="list-style-type: none">• Document provided – no comments	

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Androscoggin Home Health Services, Inc.

DATE: 2/1/24

EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
	<ul style="list-style-type: none"> N – Bidder proposes a total of 1.5 FTE nurses/social workers to provide this service. Based on past experience, this will not be enough to provide quality services that meet all standards for the number of clients/public health districts to be services. Q – description of proposed new hire from St. Mary's, who would account for half of all FTEs providing services.
	<ul style="list-style-type: none"> Has standards in place that meet these requirements. Q – mentions EHR, which could mean double data entry (and increased admin burden) because CAREWare is required.
	<ul style="list-style-type: none"> Has standards in place to meet these requirements.
	<ul style="list-style-type: none"> Response is vague but indicates ability to meet requirements.
	<ul style="list-style-type: none"> Response is vague but indicates ability to meet requirements.
	<ul style="list-style-type: none"> P – detailed response that meets requirements.
	<ul style="list-style-type: none"> Response indicates ability to meet requirements.
	<ul style="list-style-type: none"> Q – response again seems to indicate reliance on EHR rather than CAREWare, raising concerns about administrative burden. Response indicates ability to meet requirements.
	<ul style="list-style-type: none"> Response is vague but indicates ability to meet requirements.
	<ul style="list-style-type: none"> Response indicates ability to meet requirements.
	<ul style="list-style-type: none"> P – detailed response that meets requirements.
	<ul style="list-style-type: none"> N – response is vague and does not reference the PCN or respond about participating in quarterly meetings with the Department.
	<ul style="list-style-type: none"> N – response is vague, and this has historically been an area of underperformance for past Providers over the last 15 years.
	<ul style="list-style-type: none"> P – Bidder has established, aggressive systems for ensuring Payer of Last Resort/screening for MaineCare eligibility.
B. Client Eligibility	
	<ul style="list-style-type: none"> Response indicates ability to meet requirements.
	<ul style="list-style-type: none"> Response indicates ability to meet requirements.
C. Case Management Service Delivery	
	<ul style="list-style-type: none"> Response indicates ability to meet requirements.
	<ul style="list-style-type: none"> Response indicates ability to meet requirements.
	<ul style="list-style-type: none"> Response indicates ability to meet requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Androscoggin Home Health Services, Inc.

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EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
D. Medical Transportation Assistance
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
E. Discharge Requirements
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response is vague but indicates intention to meet requirements.
F. Case Management Documentation Requirements
<ul style="list-style-type: none"> • Response indicates double data entry. Reviewer has concerns about increased administrative burden.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements and speaks to double-data entry.
<ul style="list-style-type: none"> • P – strong response indicating expertise in data systems and reporting.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
G. Confidentiality of Client Information
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response is vague but indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
H. Fiscal Requirements
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • P – strong response indicating expertise in this area.
I. Staffing Requirements
<ul style="list-style-type: none"> • N – recent concerns related to the termination of the St. Mary's case management program will impact the Department's agreement to the proposed staff.
<ul style="list-style-type: none"> • Response related to licensure indicates ability to meet requirements.
<ul style="list-style-type: none"> • Response indicates ability to meet requirements.
<ul style="list-style-type: none"> • P – training plan in attachment 7 is thorough.
J. Policy Requirements

**STATE OF MAINE
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EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
K. Performance Measures
• Response indicates ability to meet requirements.
L. Reports
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
2. Staffing
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• N – reviewer has strong concerns about ability to deliver quality services to the number of clients/regions required with the number of proposed FTEs (1.75 FTE nurse/social work).
3. Implementation - Work Plan
• Response indicates ability to meet requirements.
Part IV, Section IV. Cost Proposal and Budget Narrative
• Only provided to fiscal expert in advance.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: Office of MaineCare Services, Care Coordination Unit

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Largest community-based organization serving PLWHA in Maine.• Provides case management services to more than half of all PLWHA in the state who are engaged in case management services.• Has been the statewide provider of Ryan White Part B case management services since 2014.• 8 case managers• Provides client-centered care to around 300 individuals annually living with HIV/AIDS.• Leadership serves on State and National HIV advisory boards.• Integration with additional agency services (e.g. MaineCare TCM, housing assistance/HOPWA, and prevention services).• Three current staff members maintain Maine CDC HIV and Hepatitis C testing certification.• PrEP and PEP navigation and referral services• Administers a statewide HIV self-testing distribution program• Community presence• Provided HIV case management services in Maine for approximately twenty years.• Currently maintains the contract to provide RW Part B services to RW clients.• Client outcomes consistently meet and exceed national averages.• Works closely with and has relationships with other community provider (e.g. Gilman Clinic, Horizon Program, GPH, infectious disease specialists, etc.)• Statewide grantee for three HUD, HOPWA grants.• Serves a diverse set of needs among Maine's vulnerable populations including immigrants and refugees in Portland.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: Office of MaineCare Services, Care Coordination Unit

<ul style="list-style-type: none">• Currently the only entity in the state providing both Ryan White Part B case management and MaineCare TCM services for people living with HIV.• Current coordination with MaineCare is critical to upholding Ryan White Part B's Payer of Last Resort Policy.
2. Subcontractors
<ul style="list-style-type: none">• Pending.• Bidder is currently the sole provider of Ryan White Part B case management in the State.• Currently supporting a new provider as a potential subcontractor for Ryan White Part B case management services.
3. Organizational Chart
<ul style="list-style-type: none">• Met requirement.
4. Litigation
<ul style="list-style-type: none">• None.
5. Financial Viability
<ul style="list-style-type: none">• Audited by CPA• Provided adequate historical financial statements.• No material weaknesses or significant deficiencies were identified.
6. Certificate of Insurance
<ul style="list-style-type: none">• Certificate of liability insurance was provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 1/31/24

EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: Office of MaineCare Services, Care Coordination Unit

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
	<ul style="list-style-type: none"> • Oldest and largest provider of community-based HIV services • Current team of 8 HIV case managers who serve 260+ people living with HIV/AIDS primarily in Districts 1 and 2 (majority of PLWHA in Maine reside). • Case managers serve both Ryan White Part B and MaineCare eligible clients • Have had success delivering Ryan White Part B case management services in other districts through subcontracting agreements. • Has supported other HIV service providers (e.g. clinical supervision, insurance enrollment training, and support for HIV) • Regarding vacancies: reach out to key community partners to share opportunities to effectively recruit and retain diverse candidates with relevant experience testing and linkage to care.
	<ul style="list-style-type: none"> • Met requirements.
	<ul style="list-style-type: none"> • Located at 30 Danforth St. in Portland since 2009. • Shares a street corner with a public metro bus stop • Uses Lyft Healthcare – especially for non MaineCare clients. • Provides free bus passes
	<ul style="list-style-type: none"> • Auditing team that meets weekly to audit charts and ensure program standards are upheld. • Rotates case managers onto the auditing team weekly to expand the auditing team's capacity and support ongoing collaboration and learning. • Annual internal case management training. • Individual case managers receive weekly supervision and attend weekly team meetings
	<ul style="list-style-type: none"> • Prepared to cooperate with any federal investigation
	<ul style="list-style-type: none"> • Maintains a memorandum of agreement with Stratus Audio, an independent certified medical interpreting service. • This phone interpreting service supports clients who experience stigma and may prefer a third-party out-of-state interpreter to protect confidentiality. • Maintain printed materials related to care available in multiple languages. • Also utilizes qualified, in-person interpreters. • Currently employs a bilingual case manager. • Utilizes texting and audio-to-text platforms for clients with hearing challenges. • Proven success in advocating for text interactions as a covered service with both MaineCare and Ryan White.

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EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: Office of MaineCare Services, Care Coordination Unit

<ul style="list-style-type: none">• Executive Director currently serves as MeHAAB's provider co-chair.
<ul style="list-style-type: none">• Currently participates in site visits as part of the agency's current administration of Ryan White Part B case management services.• Financial department maintains appropriate documentation of programmatic adherence to the Payer of Last Resort Policy.• Also use human resource data to demonstrates adherence to the required hours of direct service delivered per program FTE.
<ul style="list-style-type: none">• List of providers with active Memoranda of Agreement was provided (14 entities)• This minimizes service duplication and provides the wrap-around care needed• Referral Packet for Outside Providers is accessible directly on bidder's website.
<ul style="list-style-type: none">• Uses social media and radio ads, event promotion, community coalition meetings and multilingual printed materials at key community venues, including service providers that reach populations at highest risk of HIV.• Multi-lingual printed flyers and posters, including updates in Ryan White Newsletters, and client mailings.• Materials also produced in a digital format for clients who prefer electronic communication, including email, social media, and website updates.• Waiting area and client rooms display flyers for community events and announcements.• Current advocacy page on the agency's website• Community opportunities, events, and announcements are also distributed to staff through internal communication so information can quickly get to clients.
<ul style="list-style-type: none">• Anonymous client suggestion box in the waiting area.• Client survey (offered in seven languages)• Monthly support group• Has Grievance Policy• Coordinates interviews with clients
<ul style="list-style-type: none">• Currently complies with the requirement of a CQM Program.• Weekly Case Management Support Team Meeting.• Has Equity, Diversity, and Inclusion Committee• Multiple examples of positive actions/changes that have been implemented from/due to the CQM Program.
<ul style="list-style-type: none">• Currently meeting the requirement.• Documented in CAREWare, and timesheet reporting through the agency's Paychex payroll processing platform.• Routinely monitored by Program Data Manager

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Emily Bean

EVALUATOR DEPARTMENT: Office of MaineCare Services, Care Coordination Unit

<ul style="list-style-type: none">• Case managers meet weekly with their supervisor• Finance Department also utilizes CareWare service reports to perform monthly and quarterly service unit monitoring.
<ul style="list-style-type: none">• Bidder screens for insurance enrollment and eligibility, and assists clients with applications as appropriate during intake.• Case Managers are also trained to recognize changes to eligibility.• Compliance with the Payer of Last Resort Policy is monitored by Program Data Manager, Finance Director, Finance Support Specialist, and Case Management Supervisor.
B. Client Eligibility
<ul style="list-style-type: none">• Request for Services forms include gathering income and immigration status (used for insurance eligibility) and linkage to the AIDS Drug Assistance Program.• Request for Services forms are submitted to the Case Management Supervisor for case management assignment and intake scheduling.• Referral packet contains the Request for Services form.
<ul style="list-style-type: none">• Met requirement.
C. Case Management Service Delivery
<ul style="list-style-type: none">• Worked with the Department in successfully advocating for text message communication service delivery.• Case managers are trained on accounting for this communication, especially as it differs from MaineCare covered services under Targeted Case Management.• Bidder claims to have a strong record of maintaining quarterly contact and documenting attempts to contact.
<ul style="list-style-type: none">• Client Rights & Responsibilities• Notice of Privacy Practices at intake and annually thereafter.• Met requirement.
<ul style="list-style-type: none">• Paperwork follows Department guidance and is available to case managers as a fillable pdf file or may be completed by hand.• Care Plans are documented in client charts and evaluated for compliance by the Case Management Support team during weekly chart audits.• Met requirement.
<ul style="list-style-type: none">• Met requirement.
D. Medical Transportation Assistance
<ul style="list-style-type: none">• BAA with Lyft Healthcare• Provides gas cards and bus passes.

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<ul style="list-style-type: none">• Met requirement.
E. Discharge Requirements
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Case managers ensure clients have necessary contact information for providers, Ryan White Part B program, and are aware of any upcoming recertification or insurance enrollment due dates.
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Met requirement.
F. Case Management Documentation Requirements
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Iron Mountain agreement (provides HIPAA complaint confidential destruction)• Staff receive mandatory HIPAA training upon hire and annually to ensure program compliance.
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Program data manager is responsible for data entry following intake and annual assessments. This ensures program integrity and data consistency.• Met requirement.
<ul style="list-style-type: none">• Met requirement.
<ul style="list-style-type: none">• Case Management Support Team consists of 5 individuals. Each individual is responsible for auditing one chart at the weekly meeting (consist of both MaineCare and RW charts).• In addition, Program Data Manager is responsible for randomly choosing charts. This ensures the quantity of Ryan White Part B case management client charts meet the 10% required auditing.
G. Confidentiality of Client Information
<ul style="list-style-type: none">• All staff members receive mandatory comprehensive HIPAA training at orientation and annually.• Case Managers are trained on obtaining and documenting informed consent for transmitting or discussing PHI.• Visitors and vendors entering the office sign confidentiality agreements in addition to maintaining BAAs and MOAs as appropriate.• Systems Engineering (SE) provides integrated IT and cybersecurity services.• Has agreements with vendors for providing confidential destruction services for technology hardware and paperwork.• Case managers are trained on protocols related to reporting any risk of or accidental disclosure.

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EVALUATOR DEPARTMENT: Office of MaineCare Services, Care Coordination Unit

<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
<ul style="list-style-type: none"> • Met requirement.
H. Fiscal Requirements
<ul style="list-style-type: none"> • Currently uses Intuit QuickBooks Accounting Software. This can track all accounting revenue and expense transactions by class (department). • Use Paychex as our payroll provider which provides Labor Distribution reports • The Finance Director works with an accounting firm who conducts the annual financial statement audit and the Annual Audit Report is submitted before the deadline.
<ul style="list-style-type: none"> • Bidder has been an enrolled MaineCare provider for over twenty years. • Bills MaineCare weekly • Changes to insurance coverage for clients is immediately reported and documented in CAREWare to ensure payer of last resort.
<ul style="list-style-type: none"> • Case managers are trained to assess and identify insurance eligibility as well as the Department's Payer of Last Resort Policy. • Case managers receive enrollment training and understand the urgency of ADAP determinations (for quick access to HIV medications) and other insurance enrollment. • Also help clients enroll in employers' insurance. • Bidder has experience in providing support to partner/other providers who lack capacity and experience.
I. Staffing Requirements
<ul style="list-style-type: none"> • Met requirement. • Eight case managers and clinical supervisor currently on staff have a combined 50 years of experience delivering case management services at this agency.
<ul style="list-style-type: none"> • A sample week one and two orientation and training schedule for case managers was included. • Direct service staff participate in National Conferences and training opportunities relevant to HIV care and service delivery (e.g. International AIDS Conference, National Social Work and HIV Conference, National HIV/AIDS Conference, and the Biomedical HIV Prevention Summit.) • Agency maintains a professional development program.
J. Policy Requirements
<ul style="list-style-type: none"> • Confidentiality Policy, Password Policy, Mobile Device Policy, Records Management Policy and Disclosure Policy was provided.

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EVALUATOR DEPARTMENT: Office of MaineCare Services, Care Coordination Unit

<ul style="list-style-type: none">• Policies are reviewed annually and included in staff trainings and handbooks.
<ul style="list-style-type: none">• Provided to staff and board as appropriate during annual training and orientation.• Met requirement.
<ul style="list-style-type: none">• Met requirement.
K. Performance Measures
<ul style="list-style-type: none">• Met requirement.
L. Reports
<ul style="list-style-type: none">• A detailed description was provided for each report. It included how data is compiled and what staff person is responsible for completing it.• A detailed description was provided for each report. It included how data is compiled and what staff person is responsible for completing it.
2. Staffing
<ul style="list-style-type: none">• Met requirement.• If no appropriate subcontractors exist, FPC is prepared to expand its capacity through hiring.
<ul style="list-style-type: none">• Met requirement.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met requirement.• Bidder feels confident that since they are currently providing Ryan White Part B case management services implementation would be seamless.
Part IV, Section IV. Cost Proposal and Budget Narrative
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: February 03,2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Cover Page – met requirements.• Debarment Form – met requirements.• Qualifications – met requirements.• Projects – provided 3 related projects, Current HIV Care Management, Housing Opportunities for Persons With Aids (HOPWA), and Targeted Case Management for Adults Living with AIDS (TCM). All projects provide services to State of Maine patients with HIV/AIDS.
2. Subcontractors
<ul style="list-style-type: none">• One pending subcontractor to examine capacity and operational plans
3. Organizational Chart
<ul style="list-style-type: none">• Met requirements• One opening – not critical to RFP
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• Good
6. Certificate of Insurance
<ul style="list-style-type: none">• Met requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: February 03,2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
<ul style="list-style-type: none"> Will provide services in the Public Health Districts listed above. 8 case managers with training in HIV. Also support other HIV service providers. 	
<ul style="list-style-type: none"> a. Monday through Friday 9 am to 5 pm, with 8-9 AM available, After hours support available. Case managers notify clients for unexpected closures such as weather. b. Services can be in-person or virtual. 	
<ul style="list-style-type: none"> a. Services provided at facility, client's home or mutually agreed setting. The Bidders facility is fully compliant with ADA and accessible by public transportation. 	
<ul style="list-style-type: none"> Met Requirements 	
<ul style="list-style-type: none"> Met Requirements 	
<ul style="list-style-type: none"> Language and sign language interpreters will be provided. Met requirements. Met requirements. Met requirements. 	
<ul style="list-style-type: none"> 	
<ul style="list-style-type: none"> Met requirements. 	
<ul style="list-style-type: none"> 14 current agreements with local service providers. Develops new agreements on an on-going basis as appropriate 	
<ul style="list-style-type: none"> Promotes services through social media, radio ads, coalition meeting, multilingual printed materials and Case Manager/Client interviews. 	
<ul style="list-style-type: none"> Anonymous client suggestion box. Client survey available electronically in seven languages for electronic submission. Monthly Support Group. Grievance policy provided at intake and at least annually 	
<ul style="list-style-type: none"> Fully met requirements. 	
<ul style="list-style-type: none"> Fully met requirements. 	
<ul style="list-style-type: none"> In all cases Frannie screens for insurance and assists in the completion of all relevant forms for private, MaineCare, or Ryan White eligibility 	
B. Client Eligibility	
<ul style="list-style-type: none"> Confirms HIV status and Maine residency. 	

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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EVALUATOR DEPARTMENT: DHHS/MCDCP

<ul style="list-style-type: none"> • Confirms Income and immigration status. • Barriers experienced
<ul style="list-style-type: none"> • See B.1. above
C. Case Management Service Delivery
<ul style="list-style-type: none"> • Committed to client-centered care. • Fully met requirements.
<ul style="list-style-type: none"> • Fully met requirements
<ul style="list-style-type: none"> • Fully met requirements
<ul style="list-style-type: none"> • Case Managers will take client needs including referrals into consideration at all contacts. • Case Managers will reference the care plan in all contacts. • Case Managers will follow up on referrals, lab results and appointments regularly. • Case Managers will refer and monitor stability across housing, access, mental health, substance abuse, food , financial , and other needs.
D. Medical Transportation Assistance
<ul style="list-style-type: none"> • Maintains a BAA with Lyft Healthcare. • Provide bus passes or gas cards as appropriate
<ul style="list-style-type: none"> • Met requirements
E. Discharge Requirements
<ul style="list-style-type: none"> • Met requirements
<ul style="list-style-type: none"> • Met requirements
<ul style="list-style-type: none"> • Met requirements
F. Case Management Documentation Requirements
<ul style="list-style-type: none"> • Case managers will create client records in CAREWare.
<ul style="list-style-type: none"> • Current DHHS Records Retention Policy
<ul style="list-style-type: none"> • Current Staff has access to CAREWare.
<ul style="list-style-type: none"> • Through contact with the Department Frannie ensures that all staff are using the current Guidance Manual and monitor required reboots and security updates.
<ul style="list-style-type: none"> • Met requirements
<ul style="list-style-type: none"> • Met requirements.
<ul style="list-style-type: none"> • Met requirements.
G. Confidentiality of Client Information
<ul style="list-style-type: none"> • Met requirements.
<ul style="list-style-type: none"> • Met requirements.
<ul style="list-style-type: none"> • Met requirements.

**STATE OF MAINE
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<ul style="list-style-type: none"> • Met requirements.
<ul style="list-style-type: none"> • Met requirements.
H. Fiscal Requirements
<ul style="list-style-type: none"> • Uses Intuit Quickbooks with 8 classes with a separate class for Ryan White Case Management
<ul style="list-style-type: none"> • Enrolled MaineCare provider.
<ul style="list-style-type: none"> • Over half of current HIV case management clients are Medicaid eligible.
<ul style="list-style-type: none"> • Case Managers are trained to determine insurance eligibility and the Payer of last Resort Policy
I. Staffing Requirements
<ul style="list-style-type: none"> • The 8 case managers and the clinical supervisor have over 50 years of HIV Case Management.
<ul style="list-style-type: none"> • Active LCSW, LCSW-CC, and LMSW licenses in good standing.
<ul style="list-style-type: none"> • Internal annual case management training.
<ul style="list-style-type: none"> • Attends Department training.
<ul style="list-style-type: none"> • Participation in national conferences.
J. Policy Requirements
<ul style="list-style-type: none"> • Provided as Attachment 8 and includes Confidentiality Policy, Password Policy, Mobile Device Policy, Records Management Policy ,and Disclosure Policy.
<ul style="list-style-type: none"> • Materials in Attachment 9 are provided annually and as revised.
<ul style="list-style-type: none"> • Policies are reviewed annually, updated as needed, and staff is trained on any revisions following approval.
K. Performance Measures
<ul style="list-style-type: none"> • The Case Management Support Team performs weekly audits to ensure compliance with measures c-f above.
<ul style="list-style-type: none"> • The Program Data Manager monitors measures a, b, and g.
L. Reports
<ul style="list-style-type: none"> • Met requirements
<ul style="list-style-type: none"> • Met requirements
2. Staffing
<ul style="list-style-type: none"> • Met requirements
<ul style="list-style-type: none"> • Met requirements
<ul style="list-style-type: none"> • Met requirements
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Met requirements

Part IV, Section IV. Cost Proposal and Budget Narrative

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: February 03,2024

EVALUATOR NAME: Robert F. Chicoria

EVALUATOR DEPARTMENT: DHHS/MCDCP

- | |
|--|
| <ul style="list-style-type: none">• \$455,130 Total Cost• Budget Narrative provided |
|--|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/1/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS MCDC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P-Provide care to 300 individuals living with HIV/AIDS in Maine each year• I-Work follows National HIV/AIDS Strategy and Maine's Integrated Plan• P-Services focused on people living with HIV/AIDS• I- Sole provider of Ryan White Part B case management services
2. Subcontractors
<ul style="list-style-type: none">• I-One in progress
3. Organizational Chart
<ul style="list-style-type: none">• P- No vacancies in case management team
4. Litigation
<ul style="list-style-type: none">• No lawsuits listed
5. Financial Viability
<ul style="list-style-type: none">• I- Contracts with Maine DHHS CDC
6. Certificate of Insurance
<ul style="list-style-type: none">• I- Two insurers

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/1/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS MCDC

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
	<ul style="list-style-type: none"> I-Note they primarily work in Districts 1 & 2, but support all of Maine I- Various trainings for staff
	<ul style="list-style-type: none"> Q-Remote start at 8am, office hours start at 9am P-Offer in-person and telehealth P-Arrange for before or after hour client services
	<ul style="list-style-type: none"> I- Use Lyft and bus passes P- Work with client to meet where they are most comfortable
	<ul style="list-style-type: none"> I- Weekly audits
	<ul style="list-style-type: none"> Bidder meets requirement
	<ul style="list-style-type: none"> I- Use Stratus Audio via phone and can request in-person interpreters
	<ul style="list-style-type: none"> Currently have staff and clients that attend meetings
	<ul style="list-style-type: none"> P- History of site visits with the Department
	<ul style="list-style-type: none"> I-Currently has 14 agreements and willing to establish new agreements as needed
	<ul style="list-style-type: none"> I-Provide various communication methods for clients
	<ul style="list-style-type: none"> P-Client feedback survey in 7 languages P- Clients presented grievance policy at intake and annually I- Client interviews alongside State staff
	<ul style="list-style-type: none"> P- Has existing program and delivers quarterly reports to Department P- New programming developed based on CQM program
	<ul style="list-style-type: none"> Bidder meets requirement
	<ul style="list-style-type: none"> P- Case managers check for changes in eligibility
B. Client Eligibility	
	<ul style="list-style-type: none"> P- Request for services form is used
	<ul style="list-style-type: none"> Bidder meets requirement
C. Case Management Service Delivery	
	<ul style="list-style-type: none"> I- Implement text messaging for additional privacy
	<ul style="list-style-type: none"> P- Ongoing assessment of eligibility changes P- Comprehensives assessment annual and during intake
	<ul style="list-style-type: none"> I- Care plans evaluated weekly
	<ul style="list-style-type: none"> I- counsel on medication adherence, harm reduction, and prevention strategies
D. Medical Transportation Assistance	
	<ul style="list-style-type: none"> I-Use Lyft safety ride features

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/1/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS MCDC

<ul style="list-style-type: none"> Bidder meets requirement
E. Discharge Requirements
<ul style="list-style-type: none"> I- Plans for continuity of care when client moves out of state
<ul style="list-style-type: none"> P- Provide client with important information for continued care
<ul style="list-style-type: none"> Bidder meets requirement
F. Case Management Documentation Requirements
<ul style="list-style-type: none"> I- Client chart organization monitored during weekly audits
<ul style="list-style-type: none"> Bidder meets requirement
<ul style="list-style-type: none"> P- Provide training
<ul style="list-style-type: none"> Bidder meets requirement
<ul style="list-style-type: none"> P- Case managers ongoing training to enter information
<ul style="list-style-type: none"> I- Use CAREWare to evaluate work
<ul style="list-style-type: none"> P- Weekly audit of 23% files
G. Confidentiality of Client Information
<ul style="list-style-type: none"> P- Mandatory HIPAA training annually
<ul style="list-style-type: none"> P- Clients routinely receive privacy notices
<ul style="list-style-type: none"> Bidder meets requirement
<ul style="list-style-type: none"> Bidder meets requirement
<ul style="list-style-type: none"> P- Staff trained to take immediate action
H. Fiscal Requirements
<ul style="list-style-type: none"> I- Accounting software separates by department
<ul style="list-style-type: none"> P- Enrolled for over 20 years
<ul style="list-style-type: none"> I- Provide assistance to partner providers
I. Staffing Requirements
<ul style="list-style-type: none"> P- Active licenses in good standing
<ul style="list-style-type: none"> P- Coordinate with Department for trainings
J. Policy Requirements
<ul style="list-style-type: none"> I- Policies reviewed annually
<ul style="list-style-type: none"> Bidder meets requirement
<ul style="list-style-type: none"> Bidder meets requirement
K. Performance Measures
<ul style="list-style-type: none"> I- Use CAREWare data
L. Reports
<ul style="list-style-type: none"> Bidder meets requirement
<ul style="list-style-type: none"> I- Currently do monthly reporting
2. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/1/2024

EVALUATOR NAME: Carolina Rojas-Becerra

EVALUATOR DEPARTMENT: DHHS MCDC

• Bidder meets requirement
• I- Plan in case of no subcontract
• I- Planning for subcontract
3. Implementation - Work Plan
• I-Subcontractor meetings
• I-Weekly chart audits

Part IV, Section IV. Cost Proposal and Budget Narrative
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/2/24

EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – extensive history providing this service.• P – extensive history specifically serving people living with HIV.• P – runs a housing program specifically for people living with HIV.
2. Subcontractors
<ul style="list-style-type: none">• Noted that subcontractor relationship is pending
3. Organizational Chart
<ul style="list-style-type: none">• Document provided – no comments
4. Litigation
<ul style="list-style-type: none">• None identified.
5. Financial Viability
<ul style="list-style-type: none">• Audits provided - no comments
6. Certificate of Insurance
<ul style="list-style-type: none">• Document provided – no comments

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/2/24

EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">• P – primarily serves districts 1 and 2 but has had successful subcontracts to serve the other districts
<ul style="list-style-type: none">• P – details relationships with other HIV service providers
<ul style="list-style-type: none">• Has standards in place that meet these requirements.
<ul style="list-style-type: none">• Has standards in place to meet these requirements.
<ul style="list-style-type: none">• P – staff are already familiar with and trained in Ryan White HIV/AIDS Program policies
<ul style="list-style-type: none">• P – staff are already familiar with and trained in CAREWare use
<ul style="list-style-type: none">• Has standards in place to meet these requirements.
<ul style="list-style-type: none">• Has standards in place to meet these requirements.
<ul style="list-style-type: none">• P – detailed response that meets requirements.
<ul style="list-style-type: none">• P – executive director serves as co-chair of MeHAAB.
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
<ul style="list-style-type: none">• P – names specific relevant providers with executed memoranda of agreement
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
<ul style="list-style-type: none">• P – detailed response that meets requirements.
<ul style="list-style-type: none">• P – detailed response that meets requirements.
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
<ul style="list-style-type: none">• P – detailed response that meets requirements.
B. Client Eligibility
<ul style="list-style-type: none">• P – detailed response that meets requirements.
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
C. Case Management Service Delivery
<ul style="list-style-type: none">• P – detailed response that meets requirements.
<ul style="list-style-type: none">• P – detailed response that meets requirements.
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
<ul style="list-style-type: none">• P – detailed response that meets requirements.
D. Medical Transportation Assistance
<ul style="list-style-type: none">• P – detailed response that meets requirements.
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
E. Discharge Requirements

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/2/24

EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
F. Case Management Documentation Requirements
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• P – detailed response that meets requirements.
• Response indicates ability to meet requirements.
• P – staff are already trained and using CAREWare.
• Response indicates ability to meet requirements.
• P – detailed response that meets requirements.
• P – detailed response that meets requirements.
G. Confidentiality of Client Information
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
H. Fiscal Requirements
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• P – well-versed in this policy and provides support to partner providers.
• Response indicates ability to meet requirements.
• P – current staff are already trained to meet requirements.
• P – training plan in attachment 7 is thorough.
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
I. Performance Measures
• P – has functioning systems in place for monitoring these performance measures.
J. Reports
• Response indicates ability to meet requirements.
• Response indicates ability to meet requirements.
2. Staffing
• Response indicates ability to meet requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311236

RFP TITLE: HIV Case Management

BIDDER NAME: Frannie Peabody Center

DATE: 2/2/24

EVALUATOR NAME: Tara Thomas

EVALUATOR DEPARTMENT: DHHS CDC

<ul style="list-style-type: none">• Response indicates ability to meet requirements.
<ul style="list-style-type: none">• P – current staffing model meets the requirements of the program.• Response indicates ability to meet requirements going forward.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Response indicates ability to meet requirements.
Part IV, Section IV. Cost Proposal and Budget Narrative
<ul style="list-style-type: none">• Only provided to fiscal expert in advance.



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311236
RFP TITLE: HIV Case Management**

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

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

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

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

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

DocuSigned by:

Emily Bean

DDDB8E2B74FB417

Signature

Jan-29-2024

Date



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311236
RFP TITLE: HIV Case Management**

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

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DocuSigned by:

Robert Chicoria

2F924866988542A

Signature

Jan-29-2024

Date



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311236
RFP TITLE: HIV Case Management**

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

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DocuSigned by:
A handwritten signature in black ink, appearing to read "CR Becerra".
B02135D4C22E436

Signature

Jan-29-2024

Date



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311236
RFP TITLE: HIV Case Management**

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

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DocuSigned by:

A blue ink signature of Tara Thomas.

D95B4706B0554D5

Signature

Jan-29-2024

Date