

State of Maine
Master Score Sheet

RFP# 202402025			
Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)			
Bidder Name:		Milliman, Inc.	Public Consulting Group LLC
Proposed Cost:		\$386,050.00	\$346,462.00
Scoring Sections	Points Available		
Section I: Preliminary Information	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	30.00	18.00	18.00
Section III: Proposed Services	40.00	33.00	23.00
Section IV: Cost Proposal	30.00	26.92	30.00
TOTAL	<u>100.00</u>	<u>77.92</u>	<u>71.00</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# 202402025, Financial Review of Independent Support Services (ISS) and
Independent Housing with Services Program (IHSP)

I. Summary

Through RFP# 202402025, two (2) Bidders provided a response: Milliman, Inc. and Public Consulting Group LLC. Through the evaluation process, Milliman, Inc. 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 Milliman, Inc.

- Provided strong organizational experience and connections with the proposed services.

IV. Proposed Services for Milliman, Inc.

- Provided a comprehensive response outlining a clear understanding of and ability to meet programmatic expectations outlined in the RFP.

V. Cost

Milliman, Inc. proposed a cost of \$386,050.00

VI. Conclusion

Out of 100 possible points, Milliman, Inc. scored 77.92, which was the highest point total awarded by the Evaluation Team. The strengths of Milliman, Inc'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 Milliman, Inc. represents the best value to the State of Maine.

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May-23-2024

Via Electronic Mail: gwyn.volk@milliman.com

Milliman, Inc.
Gwyn Volk, Principal and Senior Healthcare Consultant
71 S. Wacker Drive, 31st Floor
Chicago, IL 60606

SUBJECT: Notice of Conditional Contract Award under RFP #202402025 Financial Review of Independent Support Services (ISS) and Independent Housing with Support Program (IHSP)

Dear Gwyn Volk,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of Aging and Disability Services. 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:

- Milliman, Inc.

Milliman, Inc. received the evaluation team's highest ranking. The Department will be contacting Milliman, Inc. 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 Milliman, Inc. Milliman, Inc. 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.

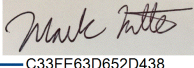
As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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:


C33FE63D652D438...

Mark Lutte
Chief Operating Officer
Office of Aging and Disability Services

DocuSigned by:


66738ED17E0C4B2...

Jim Lopatosky
Director
Division of Contract Management

Janet T. Mills
Governor

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May-23-2024

Via Electronic Mail: jcarbeau@pcgus.com

Public Consulting Group LLC
Joseph Carbeau, Associate Manager
148 State Street, 10th Floor
Boston, MA 02109

SUBJECT: Notice of Conditional Contract Award under RFP #202402025 Financial Review of Independent Support Services (ISS) and Independent Housing with Support Program (IHSP)

Dear Joseph Carbeau,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of Aging and Disability Services. 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:

- Milliman, Inc.

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

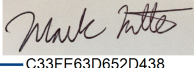
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Sincerely,

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Mark Lutte
Chief Operating Officer
Office of Aging and Disability Services

DocuSigned by:


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Jim Lopatosky
Director
Division of Contract Management

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Milliman, Inc.

DATE: May 15, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Lora Blackwell, Heather Thompson, Nicole Rooney, and Heather Bingelis

<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	30.00	18.00
Section III. Proposed Services	40.00	33.00
Section IV. Cost Proposal	30.00	26.92
<u>Total Points</u>	<u>100.00</u>	<u>77.92</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Milliman, Inc.

DATE: May 15, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Milliman, Inc.

DATE: May 15, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	18.00

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) relevant project examples. • Certifying actuary for 19 states' Medicaid programs. • Indicates being the largest actuarial and data analytic consulting firm in the world. • Has supported state rate methodology for Physical Disability (PD), aging, ISS and Serious Mental Illness (SMI) populations.
2. Subcontractors
<ul style="list-style-type: none"> • Indicated none.
3. Organizational Chart
<ul style="list-style-type: none"> • Met the requirements.
4. Litigation
<ul style="list-style-type: none"> • Did not provide a list of all current and past litigation but provided a statement indicating no litigation was relevant to this RFP.
5. Financial Viability
<ul style="list-style-type: none"> • Appears financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Milliman, Inc.

DATE: May 15, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	33.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> • Intends to add a project management approach to the agenda for kick off meeting. • Will demonstrate understanding of programs ISS/IHSP during the kick off meeting. • Plans to leverage national experience to understand the facets of IHSP and ISS that may help align or differ from other states programs similar in nature to identify how these may impact rates. • Provided descriptions of Bidder lead responsibilities. • Will conduct an all stakeholder meeting to go over the project as a whole. • Will utilize two (2) advisory groups (one for ISS and one for IHSP) consisting of 10-12 members each and include reps from provider advocacy and associations (as well as legislators) as needed. • Recommends having the Department financial staff attend advisory meetings. • Will use recorded survey training. • Will have a dedicated provider survey email. • Will have “office hours” meetings for technical assistance. • Will have a subpage of the Department’s website for a one-stop technical assistance location for the provider survey otherwise everything will be done via email. • Proposed review of four (4) peer states. • Indicates if there is limited cost data available, will look to use national benchmarks and how data will be leveraged while noting limitations. • Will utilize a recently conducted national survey on payment approaches for 1915(c) waivers and review of Medicaid home services in New England to develop rate assumptions. • Will conduct a virtual meeting with Maine Area Agency on Aging and OADS to discuss payment rates for services funded through the Older Americans Act.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Milliman, Inc.

DATE: May 15, 2024

<ul style="list-style-type: none"> • Provided a clear detailed outline of events related to developing a draft rate model. • Will ensure a proportion of the rates are used for direct care compensation to comply with the Access Rule.
B. Website Requirements
<ul style="list-style-type: none"> • Met the requirements.
C. Rate Review Process Plan
<ul style="list-style-type: none"> • Proposed a customized five-to-ten-year rate review plan as roadmap to implementation. • Stated, if the Department would like a comparison of eligibility standards included, a similar benchmarking analysis of eligibility standards with supporting sources will be created. • Will utilized an independent rate model approach which will serve to reduce administrative complexities for updating rates.
D. Presentation of the ISS and IHSP Cost Study models
<ul style="list-style-type: none"> • Met the requirements.
E. Consultation After Final Report
<ul style="list-style-type: none"> • Demonstrated the capacity to support the three (3) additional consultations and appears to be flexible on the timeline should it be needed.
F. Reports
<ul style="list-style-type: none"> • Met the requirements.
2. Staffing
<ul style="list-style-type: none"> • Many of the positions listed have HCBS payment rate development expertise. • Staffing plan appears reasonable.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided a detailed work plan.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Milliman, Inc.

DATE: May 15, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$346,462.00	÷	\$386,050.00	x	30.00 points	=	26.92

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Public Consulting Group LLC

DATE: May 15, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Lora Blackwell, Heather Thompson, Nicole Rooney, and Heather Bingelis

<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	30.00	18.00
Section III. Proposed Services	40.00	23.00
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<u>Total Points</u>	<u>100.00</u>	<u>71.00</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Public Consulting Group LLC

DATE: May 15, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Public Consulting Group LLC

DATE: May 15, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	18.00

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) relevant project examples including recent work with Maine DHHS OADS for Neurobehavioral Treatment Programs. • Have experience working with Medicaid and health and human services agencies in 40+ states. • Have over 35 years of experience facilitating reviews for Medicaid programs.
2. Subcontractors
<ul style="list-style-type: none"> • None indicated.
3. Organizational Chart
<ul style="list-style-type: none"> • Met the requirements.
4. Litigation
<ul style="list-style-type: none"> • Met the requirements.
5. Financial Viability
<ul style="list-style-type: none"> • Appears financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER: Public Consulting Group LLC

DATE: May 15, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	23.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> • Proposed recurring bi-weekly meetings with the Department. • Provided a proposed agenda. • Provided information not relevant to facilitating kick off meeting with respective advisory groups of Providers and other stakeholders identified by the Department. • Proposed a stakeholder group with 15-18 members. • Proposed monthly stakeholder meetings. • Did not address presenting a draft of the Provider agency surveys to be conducted. • Implies a single survey for both ISS/IHSP services. • Provided details of how data inconsistencies or variations will be approached. • Proposed a dedicated technical support email. • Proposed two (2) live webinars for training. • Proposed “office hours” with scheduling tool. • Lists ISS and IHSP in response to developing a draft rate model however, there are instances where only ISS is indicated.
B. Website Requirements
<ul style="list-style-type: none"> • Has a hosted IT solution provider and complies with Maine IT Digital Accessible and Social Media for State Business policy as well as six (6) other Federal and IT compliance summaries listed in the response.
C. Rate Review Process Plan
<ul style="list-style-type: none"> • Can also incorporate other goals the Department may have for both programs such as performance incentives and best practices in ongoing online data collection techniques.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402025

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BIDDER: Public Consulting Group LLC

DATE: May 15, 2024

<ul style="list-style-type: none">Proposed Excel workbook and timeline activities for three to five years for implementation and monitoring that can be adjusted based on the goals of the Department.
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none">Did not provide specific details of how they would address all the requirements of compiling and presenting reports related to the cost study and comprehensive rate assessment process.
E. Consultation After Final Report
<ul style="list-style-type: none">Met the requirements.
F. Reports
<ul style="list-style-type: none">Draft report with prelim analysis will be provided to the Department May 30, 2024, which is not feasible since the contract would not start until July 1, 2024.
2. Staffing
<ul style="list-style-type: none">Met the requirements.
3. Implementation - Work Plan
<ul style="list-style-type: none">Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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BIDDER: Public Consulting Group LLC

DATE: May 15, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$346,462.00	÷	\$346,462.00	x	30.00 points	=	30.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Milliman, Inc.

DATE: 05/12/2024

EVALUATOR NAME: Heather Bingelis

EVALUATOR DEPARTMENT: Office of MaineCare Services

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Certifying actuary for 19 states – developed rates for 13 states – in healthcare since 1947 – specialize in elders and adults with disabilities – recent work with 12 states to develop provider fee schedules and development of tiered and bundled rates for HCBS services
2. Subcontractors	<ul style="list-style-type: none"> • Bidder is not using subcontractors.
3. Organizational Chart	<ul style="list-style-type: none"> • Bidder met requirements
4. Litigation	<ul style="list-style-type: none"> • Bidder notes “The Indianapolis Health practice of Milliman has not been involved in any litigation related to the services contemplated in this proposal.”
5. Financial Viability	<ul style="list-style-type: none"> • Bidder provided consolidated financials and accompanying notes
6. Certificate of Insurance	<ul style="list-style-type: none"> • Bidder provided certificate of insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Milliman, Inc.

DATE: 05/12/2024

EVALUATOR NAME: Heather Bingelis

EVALUATOR DEPARTMENT: Office of MaineCare Services

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> Bidder met requirements – stated kick-off meeting would be at least 90 minutes (or multiple shorter meetings) and included descriptions of bidder lead responsibilities.
<ul style="list-style-type: none"> Bidder met requirements – stating would use two advisory groups (one for IAA and one for IHSP) w/ 10-12 members each, and include reps from provider advocacy and associations (as well as legislators) as needed, and initial meeting includes review of draft excel-based survey for review and discussion with advisory groups.
<ul style="list-style-type: none"> Bidder met requirements – suggests that online location of survey and related info is housed on subpage of state agency website. (suggested providing “office hours” as part of the tech assist to providers re the survey). Bidder plans to ID 4 peer states for comparison and use bidder’s own recently conducted nat’l survey or payment approaches for 1915(c) waivers and bidders review of Medicaid home services in new England to develop rate assumptions. Bidder plans to get feedback about survey results from Dept and providers at monthly meetings.
<ul style="list-style-type: none"> Bidder met requirements – data sources for rate model assumptions include: survey data, public data, Dept and provider feedback, and service definitions. Interesting - Bidder noted will ensure that proportion of the rates aere used for direct care compensation to comply with the Access Rule.
B. Website Requirements
<ul style="list-style-type: none"> Bidder states, “It is our plan to use a subpage on the State’s website to post key information and results for this project”.
<ul style="list-style-type: none"> Bidder met requirements
<ul style="list-style-type: none"> Bidder met requirements.
<ul style="list-style-type: none"> Bidder met requirements.
C. Rate Review Process Plan
<ul style="list-style-type: none"> Bidder met requirements stating, “We will develop a customized five to 10 year rate review plan that will provide a roadmap for implementation, including rate review recommendations and identification of key tasks, considerations, resources, and dates.” Bidder states will use Section 19 for benchmarking

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 05/12/2024

EVALUATOR NAME: Heather Bingelis

EVALUATOR DEPARTMENT: Office of MaineCare Services

<p>purposes. Bidder indicated, “If the Department would like include a comparison of eligibility standards, we will complete a similar benchmarking analysis of eligibility standards with supporting sources.”</p>
<ul style="list-style-type: none"> • Bidder met requirements stating, “our proposed independent rate model approach will serve to reduce administrative complexities for updating rates”.
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none"> • Bidder met requirements
<ul style="list-style-type: none"> • Bidder met requirements
E. Consultation After Final Report
<ul style="list-style-type: none"> • Bidder met requirements
F. Reports
<ul style="list-style-type: none"> • Bidder met requirements: “will develop an Excel-based Provider survey to capture cost information from the provider community” and “aggregate the Provider survey responses in an Excel database that will serve as the basis for cost study analytics”.
<ul style="list-style-type: none"> • Bidder met requirements – “maintain a dynamic project tracker that we will share with the Department during project status meetings”.
2. Staffing
<ul style="list-style-type: none"> • Bidder met requirements. Bidder is not using sub-contractors
<ul style="list-style-type: none"> • Bidder met requirements
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Bidder met requirements.
Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Milliman, Inc.

DATE: 5/10/2024

EVALUATOR NAME: Lora Blackwell

EVALUATOR DEPARTMENT: DHHS OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> P – Current and past experience developing rates and advising states with Medicaid and state-funded healthcare services.
2. Subcontractors	<ul style="list-style-type: none"> P- No subcontractors to be utilized.
3. Organizational Chart	<ul style="list-style-type: none"> P – Bidder listed full organizational chart as well as the dedicated team for this project.
4. Litigation	<ul style="list-style-type: none"> N- The RFP guidelines as to provide a listing of all current litigation where Bidder is named and a list of all closed cases within the past five (5) years in which the Bidder paid the claimant. Unsure if this Bidder has been involved in any litigation that is not related to this service.
5. Financial Viability	<ul style="list-style-type: none"> N- 2019, 2020 and 2021 were provided. The RFP guidelines are for the three (3) most recent years of financial statements. Q – Question of why 2022 and 2023 were not provided.
6. Certificate of Insurance	<ul style="list-style-type: none"> P- Valid certificate provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Milliman, Inc.

DATE: 5/10/2024

EVALUATOR NAME: Lora Blackwell

EVALUATOR DEPARTMENT: DHHS OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> • The Bidder met this requirement.
<ul style="list-style-type: none"> • P- Bidder will utilize two (2) advisory groups, one for ISS and the other IHSP. • I – Will also facilitate a virtual meeting at the beginning for all stakeholders.
<ul style="list-style-type: none"> • P – Has extensive experience, has done similar projects for ten (10) states in the last three (3) years. • N – Bidders proposal notes, aggregating and summarizing data summaries will not be shared publicly, RFP states this will be part of the documentation that will be shared publicly. • I – Bidder proposes a virtual meeting with Maine Area Agency on Aging and OADS to discuss payment rates for services funded through the Older Americans Act.
<ul style="list-style-type: none"> • P – Provided a clear outline of events.
B. Website Requirements
<ul style="list-style-type: none"> • P – Bidder plans to utilize a subpage on the States website and as such, will ensure all accessibility policies will be adhered to. • Q– Does this approach mean, internal staff would need to post these items to the States website?
<ul style="list-style-type: none"> • The Bidders response met this requirement
<ul style="list-style-type: none"> • The Bidders response met this requirement. • Q- Not understanding the portion of Bidders response that is in parentheses.
<ul style="list-style-type: none"> • P – Bidder plans to utilize a subpage on the States website. This approach will ensure all accessibility policies will be adhered to. Bidders employees sign an Acceptable Use Agreement that prohibits certain websites that present security risks.
C. Rate Review Process Plan
<ul style="list-style-type: none"> • P- Bidder proposes to develop a (5) five to ten (10) year rate review plan.
<ul style="list-style-type: none"> • P – Will provide matrix to include current rates, calculated rates and the estimated fiscal impact as well as the other items listed in the RFP. Will also utilize Gantt charting to illustrate the project schedule and timelines.
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none"> • P- Bidder has provided a clear outline of the approach they are proposing.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Milliman, Inc.

DATE: 5/10/2024

EVALUATOR NAME: Lora Blackwell

EVALUATOR DEPARTMENT: DHHS OADS

<ul style="list-style-type: none">• I- Will provide an executive summary outlining impacts and recommendations prior to the release of the Final Report.
<ul style="list-style-type: none">• Proposed in-person presentation aligns with the goals of this RFP.
E. Consultation After Final Report
<ul style="list-style-type: none">• P – Bidder has the capacity to support these three (3) additional consultations and appears to be flexible on the timeline should it be needed.
F. Reports
<ul style="list-style-type: none">• P – Aggregate data in an Excel database that will include all benchmark information outlined in the RFP.• I – Anticipated cost study will be finished before the release of the draft report. Bidder anticipates the data will be unchanged between the draft and final report.
<ul style="list-style-type: none">• P- Will also provide a draft outline to the Department prior to the draft report for discussion.
2. Staffing
<ul style="list-style-type: none">• P – Many of the positions listed have HCBS payment rate development expertise.• P- No subcontractors will be utilized.
<ul style="list-style-type: none">• The Bidders response met this requirement
3. Implementation - Work Plan
<ul style="list-style-type: none">• P – Provided an easily trackable workplan.

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">• P – Salaries and hourly rates on the cost proposal are aligned to the staffing plan provided (Attachment 8). The cost proposal is inclusive of any additional cost. The cost proposal is aligned with the budget for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Milliman, Inc.

DATE: May 9, 2024

EVALUATOR NAME: Nicole Rooney

EVALUATOR DEPARTMENT: DHHS/OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
	<ul style="list-style-type: none"> • Serves as the certifying actuary in 19 states Medicaid programs • Discrepancy in the number of reported stated Medicaid systems they assisted on rates. In one place says 13 but in another says 12 • Reports ability to help Medicaid FFS using negotiated market rate, tiered rate and bundled rate methodologies • Has supported states rate methodology for PD, aging, ISS and SMI populations • Engagement lead has 20 years’ experience in providing services to Medicaid and government programs. • Project/stakeholder lead has 15 years’ experience. Specialty area in aging and disabled services. • Use Subject Matter Expert with over 60 years experience. • 3 projects: <ul style="list-style-type: none"> ○ RI (ongoing) – comprehensive assessment of RI social and human service programs which include reviewing rate structures, credentialing, access, rates and rate benchmarks. Specific services were for personal care and homemaker services. ○ AZ (ongoing) development of market rates- DD focused ○ SC (ongoing) eval and analysis of residential rehab services provided to HCBS waiver populations
2. Subcontractors	
	<ul style="list-style-type: none"> • n/a
3. Organizational Chart	
	<ul style="list-style-type: none"> • Met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Nicole Rooney

EVALUATOR DEPARTMENT: DHHS/OADS

4. Litigation
<ul style="list-style-type: none">States they do not have litigation related to services contemplated in the RFP. Does not comment on any litigation that may affect portions of this business in the proposal.
5. Financial Viability
<ul style="list-style-type: none">Provide audit reports since 2019-2022
6. Certificate of Insurance
<ul style="list-style-type: none">Met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Milliman, Inc.

DATE: May 9, 2024

EVALUATOR NAME: Nicole Rooney

EVALUATOR DEPARTMENT: DHHS/OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> • In anticipation of kick off will prepare key questions upon review of available cost data. • Anticipate meeting to be 90 minutes. • Will demonstrate understanding of programs ISS/IHSP. Will leverage national experience to understand the facets of IHSP ad ISS that may help align or differ from other states programs similar in nature to identify how these may impact rates. • Analysis will include trends, outliers and data challenges • P: will review project management approach esp in regards to data tracking, tasks tracking, risk and mitigation strategies and communication.
<ul style="list-style-type: none"> • Provider and stakeholder engagement activities are critical to rate development and evaluation. • Will address stakeholder comments and concerns in final report • Will use 2 advisory groups to collect feedback- one for each program. Will hold monthly advisory meetings • P: will facilitate all stakeholder meetings • Advisory groups will consist of 10-12 members considering geography, size and target population. • I: Recommends department financial staff attend advisory meetings
<ul style="list-style-type: none"> • Provides clear process of how they conduct studies • Has developed three HCBS provider surveys for various states that capture wages and service related information • Approach is the develop survey and provider instructions, provide technical assistance, allow 3-4 weeks for completion, offer follow ups and reviews, aggregate and summarize data, additional research including other state experience, • Notes that is there is limited cost data available, they will look to using national benchmarks and how they would leverage data while noting limitations
<ul style="list-style-type: none"> • IRM approach develops rates independent from costs incurred. Builds rates from ground up. Components would include worker salaries and wages, unbillable time, benefits, payments to providers, employee related expenses, trans and fleet expenses, admin and overhead.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS/OADS

<ul style="list-style-type: none"> • Notes advantages to ground up IRM approach: allows consideration of historical cost experience, supports easy future updates and provides transparency. • IRM relies on 4 main data sources; provider survey, publicly available data, stakeholder and department feedback and service definitions and requirements. • P: will establish dedicated email account and accept public comments for forma 3-4 weeks
B. Website Requirements
<ul style="list-style-type: none"> • Met: Will be compliant with Maine IT accessibility and social media policies
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • Plans to use state sub web page for survey services under this contract • States they will meet OIT policies
C. Rate Review Process Plan
<ul style="list-style-type: none"> • Develop 5-10 years rate methodologies across different programs • Rate will include considerations for: provider survey, MaineCare eligibility and rates, COLA, geography, consistency
<ul style="list-style-type: none"> • met
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • Met
E. Consultation After Final Report
<ul style="list-style-type: none"> • Will provide up to 3 additional consultation meetings
F. Reports
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • met
2. Staffing
<ul style="list-style-type: none"> • Will not be using any subcontractors • Position and titles provided
<ul style="list-style-type: none"> • met
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Met- detailed

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Milliman, Inc.

DATE: 5/13/2024

EVALUATOR NAME: Heather Thompson

EVALUATOR DEPARTMENT: DHHS-OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none">• Bidder stated they are the certifying actuary for 19 states' Medicaid programs.• Bidder stated they are the largest actuarial and data analytic consulting firms in the world.• The three examples were relevant.
2. Subcontractors	<ul style="list-style-type: none">• Did not provide.
3. Organizational Chart	<ul style="list-style-type: none">• Provided.
4. Litigation	<ul style="list-style-type: none">• Stated no litigation.
5. Financial Viability	<ul style="list-style-type: none">• Provided.
6. Certificate of Insurance	<ul style="list-style-type: none">• Has cyber insurance as well.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 5/13/2024

EVALUATOR NAME: Heather Thompson

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> Proposed adding review of their project management approach to the agenda for kick off meeting.
<ul style="list-style-type: none"> Proposed conducting an all stakeholder meeting to go over the project as a whole. Proposed splitting ISS and ISHP into two separate stakeholder groups and holding a monthly meeting each. Proposed 10-12 members per group.
<ul style="list-style-type: none"> Proposed recorded survey training. Proposed dedicated provider survey email. Proposed "office hours" meetings for technical assistance. Proposed a subpage of the Department's website for a one-stop technical assistance location for the provider survey otherwise everything will be done via email. Proposed review of four peer states.
<ul style="list-style-type: none"> Met.
B. Website Requirements
<ul style="list-style-type: none"> Met.
<ul style="list-style-type: none"> Met.
<ul style="list-style-type: none"> Met.
<ul style="list-style-type: none"> Met.
C. Rate Review Process Plan
<ul style="list-style-type: none"> Proposed a customized five to ten year rate review plan as roadmap to implementation.
<ul style="list-style-type: none"> Met.
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none"> Met.
<ul style="list-style-type: none"> Met.
E. Consultation After Final Report
<ul style="list-style-type: none"> Met.
F. Reports
<ul style="list-style-type: none"> Met.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS-OADS

• Met.
2. Staffing
a. Met.
• None indicated.
• Met.
3. Implementation - Work Plan
• Met.

Part IV, Section IV. Cost Proposal
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE 05/12/2024

EVALUATOR NAME: Heather Bingelis

EVALUATOR DEPARTMENT: Office of MaineCare Services/Policy Division

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"> Bidder met requirements – “worked with Medicaid and health and human services agencies in 40+ states” and “35 years of experience” Bidder provided 4 relevant projects including recent work with Maine DHHS OADS for Neurobehavioral Tx Programs
2. Subcontractors	<ul style="list-style-type: none"> Bidder is not using sub-contractors
3. Organizational Chart	<ul style="list-style-type: none"> Bidder met requirements
4. Litigation	<ul style="list-style-type: none"> Bidder listed seventeen pending/past court actions over past 5 years.
5. Financial Viability	<ul style="list-style-type: none"> Bidder met requirements
6. Certificate of Insurance	<ul style="list-style-type: none"> Bidder met requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE 05/12/2024

EVALUATOR NAME: Heather Bingelis

EVALUATOR DEPARTMENT: Office of MaineCare Services/Policy Division

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> • Bidder met requirements – suggest pre-kick off as well as a 90-minute to 2-hour kick-off meeting to discuss priorities for deliverables with this contract - bidder included a list of preliminary/possible agenda topics for the kick-off meeting. Acknowledged potential need to adjust workplans etc as a direct result of the kick-off meeting(s).
<ul style="list-style-type: none"> • Bidder met requirements – suggesting 15-18 participants based on previous experience.
<ul style="list-style-type: none"> • Bidder met requirements • build upon data collection tools we have used in similar rate setting projects around the country • survey can be in Excel as noted in the RFP or in an online format if preferred by the Department. It will include a PCG customized cost instrument, personnel roster, and instructions • conduct at least two (2) live webinars to train providers on how to complete the survey • technical assistance includes: A website or other repository, A designated email address (e capacity to embed a scheduling tool right into our email signature), Training webinars, Use of office hours, Additional training • market research will begin at the onset of the project
<ul style="list-style-type: none"> • Bidder met requirements
B. Website Requirements
<ul style="list-style-type: none"> • Bidder met requirements • maintain a number of security certifications and has implemented state and nationally-defined standards at all levels to include: ISS and IHSP Policies and Regulations ✓ FedRAMP certified requirements ✓ FERPA regulations ✓ HIPAA regulations ✓ National Institute of Standards and Technology (NIST) Special Publication 800- 53 ✓ The Federal Information Processing Standard (FIPS) Publication 140-2 (FIPS PUB 140-2) ✓ MaineIT Digital Accessibility Policy ✓ Social Media for State Business Policy
<ul style="list-style-type: none"> • Bidder met requirements
<ul style="list-style-type: none"> • Bidder met requirements - secure electronic file transfer protocol (SFTP) site

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Office of MaineCare Services/Policy Division

<ul style="list-style-type: none"> • Bidder met requirements
C. Rate Review Process Plan
<ul style="list-style-type: none"> • Bidder met requirements – best practices from five states bidder also notes: “can also incorporate other goals the Department may have for both programs such as performance incentives and best practices in ongoing online data collection techniques”.
<ul style="list-style-type: none"> • Bidder met requirements: “discuss and adjust the activity details, timelines, and outcomes with the Department in the form of an Excel workbook that spans the full rate implementation and monitoring period (potentially three to five years)”.
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none"> • Bidder did not touch on each of the areas above rather, the bidder notes, “build off our analysis prepare a report that includes the following: Baseline Recommendations to Simplify and Streamline Rate Methodologies: PCG is the best vendor”.
<ul style="list-style-type: none"> • Bidder met requirements – “provide a clear demonstration of at least three proposed State ISS and IHSP service models along with the tools and information needed to identify the best path forward for the Departments”.
E. Consultation After Final Report
<ul style="list-style-type: none"> • Bidder met requirements – noting that members of the team have previous policy experience.
F. Reports
<ul style="list-style-type: none"> • Bidder met requirements • data sources include: <input type="checkbox"/> Applicable Federal Regulations <input type="checkbox"/> Applicable State of Maine Medicaid regulations <input type="checkbox"/> Applicable Medicaid regulations in compared states. <input type="checkbox"/> Program guidelines for the State of Maine and compared states. * Including service limits * Qualified provider lists * Service definitions * Member cost sharing requirements * Service eligibility requirements <input type="checkbox"/> Programmatic funding sources <input type="checkbox"/> Reimbursement rates for the State of Maine and compared states. <input type="checkbox"/> Bureau of Labor and Statistic Wage Data – Specific to the State/region and feedback from interested parties • leverage our knowledge of other state programs and services to compare at least three (3) states to Maine • final report will be provided in multiple formats, including a written format and a final in-person presentation
<ul style="list-style-type: none"> • Bidder states the draft report will be delivered to Dept by May 30, 2024 • Bidder notes that final report will be deliver on or before April 1, 2025.
2. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE 05/12/2024

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EVALUATOR DEPARTMENT: Office of MaineCare Services/Policy Division

<ul style="list-style-type: none">• Bidder met requirements noting 3 distinct positions (1 person/position)• Bidder also notes use of SME's & Cost Study Team (but does not specify the number for these)• Bidder does not use subcontractors
<ul style="list-style-type: none">• Includes staffing plan but not as "Attachment 8" as is directed within the RFP.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Includes a Workplan but NOT as "Attachment 9" as directed within the RFP.

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE: 5/13/2024

EVALUATOR NAME: Lora Blackwell

EVALUATOR DEPARTMENT: DHHS OADS

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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- Current and past experience conducting similar projects for many state-funded programs. Has a fifteen (15) year working relationship with the State of Maine DHHS. Has programmatic knowledge.
2. Subcontractors	<ul style="list-style-type: none">• P- No subcontractors will be used.
3. Organizational Chart	<ul style="list-style-type: none">• P- Bidder listed full organizational chart and the proposed team for this project.
4. Litigation	<ul style="list-style-type: none">• N – Seventeen (17) lawsuits in the last five (5) years.
5. Financial Viability	<ul style="list-style-type: none">• P- Bidder provided three (3) most recent years being 2021, 2022 and 2023.• I- Notes to consolidated financial statements outlining specific activities of the business and acquisitions.
6. Certificate of Insurance	<ul style="list-style-type: none">• P – Valid Certificate of Liability provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 5/13/2024

EVALUATOR NAME: Lora Blackwell

EVALUATOR DEPARTMENT: DHHS OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> The Bidder met this requirement.
<ul style="list-style-type: none"> P- Proposal appears to offer a lot of flexibility towards the needs of the Department based on what will be taken away from the advisory group meetings. I- Proposal is clearly outlined easy for the reader to follow.
<ul style="list-style-type: none"> P - Has extensive rate setting experience and a clearly defined approach. Offers Provider training in various ways (webinars, website or other format, designated e-mail address) and easily understandable training materials. I - Offers an embedded scheduling tool to allow ISS/ IHSP providers to reach out directly to them to schedule a meeting/training during this phase.
<ul style="list-style-type: none"> P- Bidder will post proposed rate and supporting documentation online and offer virtual presentations to stakeholders. Will provide methods for adjusting future rates based on inflation for forecasting purposes.
B. Website Requirements
<ul style="list-style-type: none"> P – Bidder noted they are a hosted IT solution provider and complies with Maine IT Digital Accessible and Social Media for State Business policy as well as six (6) other Federal and IT compliance summaries listed in the response.
<ul style="list-style-type: none"> The Bidder met this requirement
<ul style="list-style-type: none"> P – Bidder proposes utilizing technology that will ensure data will be handled and transferred according to the definition outlined in the RFP.
<ul style="list-style-type: none"> P- Bidder does not permit the use of these or any successor technologies.
C. Rate Review Process Plan
<ul style="list-style-type: none"> P- In the rate review process, Bidder proposes to include ISS/ IHSP best practices for program surveys from up to five (5) states they work with.
<ul style="list-style-type: none"> P – Bidder has outlined a plan that supports these parameters and will also provide an excel workbook of workplan and timeline activities, that can be adjusted based on the goals of the Department.
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none"> N- Bidder did not provide specific details of how they would manage this in this section.
<ul style="list-style-type: none"> Bidder agrees to in-person presentation.
E. Consultation After Final Report

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

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BIDDER NAME: Public Consulting Group LLC

DATE: 5/13/2024

EVALUATOR NAME: Lora Blackwell

EVALUATOR DEPARTMENT: DHHS OADS

<ul style="list-style-type: none">• P- Bidder can support these three (3) additional consultations. Based on the response, Bidder is proposing to provide summaries of the discussions at these meetings. Bidder is versed in the rulemaking process and understands the programmatic and policy implications of their recommendations.
F. Reports
<ul style="list-style-type: none">• P- Draft report- Bidder is proposing to use past ISS/IHSP experience to compare Maine to other similar states that are approved by the Department. The Final report will use detail from Draft report and incorporate feedback from the Department as well as stakeholders.
<ul style="list-style-type: none">• Q- Bidder is proposing the draft report with prelim analysis will be provided to the Department 5/30/24, is this feasible since the contract would not start until 7/1/24.• I- Bidder is proposing the Final report be provided to the Department in two formats, the first will be submitted on 1/15/2025 and the last final report would be submitted by 4/1/25.• P- Reports will include the full review period and scope.
2. Staffing
<ul style="list-style-type: none">• P –The majority of staff that have been compiled for this project have cost study analysis, rate model development, stakeholder engagement and rate process review experience.• P- No subcontractors will be utilized.
<ul style="list-style-type: none">• The Bidders response met this requirement
3. Implementation - Work Plan
<ul style="list-style-type: none">• P- Bidder provided a work plan overview listing the activities and timeframe for each as well as the implementation workplan listing the specifications of the RFP.

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">• P – Staff on the cost proposal are aligned to the staffing plan provided (Attachment 8). This cost proposal is aligned with the budget for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE: May 10, 2024; May 13, 2024; May 14, 2024

EVALUATOR NAME: Nicole Rooney

EVALUATOR DEPARTMENT: DHHS/OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Worked for over 40+ states; contracts in 50 states; vast supply of employs countrywide • I: deep understanding of ISS and IHSP services, costs studies etc. • Uses standard and proven approach to guide rate setting analysis • P: national Medicaid expert with 35+ years of facilitating financial reviews for Medicaid programs • Person centered organization • 3 relevant projects listed: <ul style="list-style-type: none"> ○ New Mexico Department of Health, Developmental Disabilities Supports Division- rate setting for HCBs waivers ○ Nebraska Department of Education Vocational Rehabilitation (Current)_ rate study for employment services ○ District of Columbia (District) Department of Health Care ○ Finance (DHCF) and Department of Behavioral Health (DBH): behavioral health rate study ○ Me DHHS Neuro behavioral rate study
2. Subcontractors
<ul style="list-style-type: none"> • Will not use sub contractors
3. Organizational Chart
<ul style="list-style-type: none"> • met
4. Litigation
<ul style="list-style-type: none"> • Several 15 + however statement of disclosure provided that no litigation would impact ability to perform work
5. Financial Viability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE: May 10, 2024; May 13, 2024; May 14, 2024

EVALUATOR NAME: Nicole Rooney

EVALUATOR DEPARTMENT: DHHS/OADS

<ul style="list-style-type: none">• Appears financially solvent
6. Certificate of Insurance
<ul style="list-style-type: none">• met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE: May 10, 2024; May 13, 2024; May 14, 2024

EVALUATOR NAME: Nicole Rooney

EVALUATOR DEPARTMENT: DHHS/OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> • Kick off within 2 weeks of contract initiation to review questions to confirm scope with Department. • Supplied proposed agenda for kick off • Proposes second kick off with stakeholders
<ul style="list-style-type: none"> • Will combine stakeholders of ISS and IHSP providers • Proposed monthly stakeholder meetings • Provides detail approach to stakeholder meetings but lacks detail in process and timeline for project, approaches to review costs and develop process.
<ul style="list-style-type: none"> • Unclear if bidder understands the department is seeking rate both for both ISS and IHSP • Provides detail of questions to be asked on survey and how data will be compiled, reviewed and analyzed. • 3-4 weeks survey process • Will provide notice and technical assistance on completing survey though web site, web training and/ or designated email address • Provides detail of how they will approach data inconsistencies or variations
<ul style="list-style-type: none"> • Bidder states they will include the following information in the rate meth: Hourly personnel costs using aggregated salary and fringe cost reported, Administrative costs are then added as an average percentage from the data collected, billable versus non-billable time, other factors identified during data gathering may be applied. • In this section bidder typically lists ISS and IHSP however instances where only ISS is indicated. • Bidder listed resources that will be used in rate development such a CPI, MEI etc. Will also utilize benchmark data is available
B. Website Requirements
<ul style="list-style-type: none"> • met
<ul style="list-style-type: none"> • met
<ul style="list-style-type: none"> • met
<ul style="list-style-type: none"> • met
C. Rate Review Process Plan
<ul style="list-style-type: none"> • Met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: May 10, 2024; May 13, 2024; May 14, 2024

EVALUATOR NAME: Nicole Rooney

EVALUATOR DEPARTMENT: DHHS/OADS

<ul style="list-style-type: none"> • Will compare 3 our states for comparison
<ul style="list-style-type: none"> • Models for 3-5 years and will adjust based on Department goals
D. Presentation of the ISS and IHSP Cost Study models
<ul style="list-style-type: none"> • met
<ul style="list-style-type: none"> • met
E. Consultation After Final Report
<ul style="list-style-type: none"> • Bidder states they will consult with department but it unclear if the consultations will be negotiated or limited
F. Reports
<ul style="list-style-type: none"> • met
<ul style="list-style-type: none"> • met
2. Staffing
<ul style="list-style-type: none"> • Will not use sub contractors
<ul style="list-style-type: none"> • Met- very clear and easy to understand roles and responsibilities
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Met- easy to follow

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

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE: 5/13/2024

EVALUATOR NAME: Heather Thompson

EVALUATOR DEPARTMENT: DHHS-OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Has previous experience with Maine Department of Health and Human Services.• Examples are relevant.
2. Subcontractors
<ul style="list-style-type: none">• Indicated none.
3. Organizational Chart
<ul style="list-style-type: none">• Met.
4. Litigation
<ul style="list-style-type: none">• Provided.
5. Financial Viability
<ul style="list-style-type: none">• Provided.
6. Certificate of Insurance
<ul style="list-style-type: none">• Has cyber insurance as well.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE: 5/13/2024

EVALUATOR NAME: Heather Thompson

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Evaluation, Analysis, and Financial Review of Independent Support Services (ISS) and Independent Housing with Services Programs (IHSP)
<ul style="list-style-type: none"> Proposed recurring bi-weekly meetings with the Department.
<ul style="list-style-type: none"> Proposed one stakeholder group with 15-18 members. Proposed monthly stakeholder meetings.
<ul style="list-style-type: none"> Proposed dedicated technical support email. Proposed two live webinars for training. Proposed "office hours" with scheduling tool.
<ul style="list-style-type: none"> Met.
B. Website Requirements
<ul style="list-style-type: none"> Met
<ul style="list-style-type: none"> Met
<ul style="list-style-type: none"> Met
<ul style="list-style-type: none"> Met
C. Rate Review Process Plan
<ul style="list-style-type: none"> Met.
<ul style="list-style-type: none"> Proposed workbook for three to five years for implementation and monitoring.
D. Presentation of the ISS and IHSP Cost Study models.
<ul style="list-style-type: none"> Did not mention executive summary or give details on the development of the report.
<ul style="list-style-type: none"> Met.
E. Consultation After Final Report
<ul style="list-style-type: none"> Met.
F. Reports
<ul style="list-style-type: none"> Met.
<ul style="list-style-type: none"> Proposed draft report complete by May 30, 2024.
2. Staffing
<ul style="list-style-type: none"> Met.
<ul style="list-style-type: none"> None indicated.
<ul style="list-style-type: none"> Met.
3. Implementation - Work Plan
<ul style="list-style-type: none"> Workplan was not in a timeline chart however it did indicate dates for tasks.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

BIDDER NAME: Public Consulting Group LLC

DATE: 5/13/2024

EVALUATOR NAME: Heather Thompson

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section IV. Cost Proposal
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**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202402025**

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent Housing with Services Program (IHSP)

I, Heather Bingelis 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:

Heather Bingelis
DE51E5CA52E041D

Signature

May-03-2024

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 #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent
Housing with Services Program (IHSP)

I, Lora Blackwell 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:
Lora Blackwell
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Signature

May-06-2024

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 #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent
Housing with Services Program (IHSP)

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

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DocuSigned by:

Nicole Rooney

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Signature

May-06-2024

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 #: 202402025

RFP TITLE: Financial Review of Independent Support Services (ISS) and Independent
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I, Heather Thompson 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:

Heather Thompson

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Signature

May-07-2024

Date