

State of Maine
Master Score Sheet

RFP# 202409163					
PFML Temporary Call Center Support					
Bidder Name:		22 nd Technology Consultants	365BOOKS PRO LLC	Alldigi Tech Inc.	Capitol Bridge LLC
Proposed Cost:		2,197,593	5,382,700.80	Incorrectly provided.	3,644,318.08
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Fail	Pass
Section II: Organization Qualifications and Experience	40	25	17	N/A	30
Section III: Proposed Services	35	17	5	N/A	28
Section IV: Cost Proposal	25	22.08	9.01	N/A	13.31
TOTAL	<u>100</u>	<u>64.08</u>	<u>31.01</u>	<u>Disqualified</u>	<u>71.31</u>
Bidder Name:		Communication Logic	Crusecom Technology Consultants LLC	DiRAD Technologies Inc.	FH Cann & Associates LLC
Proposed Cost:		3,140,649.72	3,643,379	4,115,840	3,045,474
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	40	17	17	10	28
Section III: Proposed Services	35	16	14	5	24
Section IV: Cost Proposal	25	15.45	13.32	11.79	15.93
TOTAL	<u>100</u>	<u>48.45</u>	<u>44.32</u>	<u>26.79</u>	<u>67.93</u>

RFP# 202409163					
PFML Temporary Call Center Support					
Bidder Name:		Gatestone & Co International Inc.	Maximus US Services Inc.	McGhee & Associates LLC	Nagarro Inc.
Proposed Cost:		3,715,200	3,707,360.72	2,482,600	4,864,000
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	40	15	35	7	23
Section III: Proposed Services	35	10	32	8	18
Section IV: Cost Proposal	25	13.06	13.09	19.54	9.98
TOTAL	<u>100</u>	<u>38.06</u>	<u>80.09</u>	<u>34.54</u>	<u>50.98</u>
Bidder Name:		Navient BPO LLC	PATLIVE	Public Consulting Group LLC	SaviLinx LLC
Proposed Cost:		2,505,345.45	3,091,724	3,802,428	3,343,722.60
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	40	31	17	34	38
Section III: Proposed Services	35	28	10	32	32
Section IV: Cost Proposal	25	19.37	15.69	12.76	14.51
TOTAL	<u>100</u>	<u>78.37</u>	<u>42.69</u>	<u>78.76</u>	<u>84.51</u>

RFP# 202409163					
PFML Temporary Call Center Support					
Bidder Name:		ShyftOff Corp.	Solix Inc.	The Connection	The Midtown Group
Proposed Cost:		1,940,800	2,949,640	3,057,084	4,182,994.40
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	40	5	25	28	20
Section III: Proposed Services	35	5	25	21	15
Section IV: Cost Proposal	25	25	16.45	15.87	11.60
TOTAL	<u>100</u>	<u>35</u>	<u>66.45</u>	<u>64.87</u>	<u>46.60</u>
Bidder Name:		Triple Impact Connections Inc.	Velocitii Contact Services	Working Solutions	
Proposed Cost:		2,892,040	3,057,600	3,028,940	
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	
Section II: Organization Qualifications and Experience	40	12	15	10	
Section III: Proposed Services	35	8	12	10	
Section IV: Cost Proposal	25	16.78	15.89	16.02	
TOTAL	<u>100</u>	<u>36.78</u>	<u>42.89</u>	<u>36.02</u>	

Award Justification Statement

RFP# 202409163 - PFML Temporary Call Center Support

- I. **Summary** The Maine Department of Labor (MDOL), as part of implementing the State's Paid Family and Medical Leave program (PFML), needs to partner with a vendor to provide temporary call center support to address incoming calls from employers looking to register and navigate the Paid Family Medical Leave Program's online contribution collections portal for the first time, as well as provide customer support in wage reporting and private insurance plan substitution application processes on the Portal.

- II. **Evaluation Process** The three-person evaluation team reviewed each proposal individually, and then met to score the proposals as a group. Evaluation team members have expertise in the areas of IT, state government contracting, PFML processes, and vendor oversight. Ultimately, SaviLinx was selected as the top-scoring bidder based on team consensus scoring.

- III. **Qualifications & Experience** SaviLinx is a Maine-based company with extraordinarily relevant experience as it relates to this RFP. They currently provide call center support to the Massachusetts's Department of Family and Medical Leave, which is the PFML program of that State. This experience will allow the bidder to quickly develop and adapt training materials and call scripts as they have rare program expertise based on this experience. Additionally, SaviLinx has a proven track record of providing support to the State of Maine government, including previous experience standing up a rapid-deployment call center to aid in the customer service backlog of the Maine Department of Labor's State Unemployment Insurance program during the COVID pandemic.

- IV. **Proposed Services** SaviLinx articulated a well thought out recruitment, training, and quality assurance strategy that spoke to the requirements specified in the RFP. They use a well-known call management system with robust data reporting capabilities. They articulated a collaborative approach to working with the Department to refine the metrics and operations of the call center and provided a well detailed and realistic project plan.

- V. **Cost Proposal** The awarded bidder was entitled to 14.51 out of 25 available points based on its cost proposal, as compared to the lowest of all bidders' cost proposals

- VI. **Conclusion** As the most relevantly experienced bidder who is also the only Maine headquartered business, SaviLinx is uniquely qualified as a Maine based employer to provide support to other Maine based employers about the requirements of this new

program. They have a track record of providing effective operational support quickly and professionally in directly similar programs and to several Departments in the State of Maine, including the Department of Labor.



**STATE OF MAINE
DEPARTMENT OF LABOR**

**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

22nd Century Technologies, Inc.
8251 Greensboro Dr. Suite 900
McLean, VA 22102

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Jagan Pakkirisankar:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- SaviLinx LLC

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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. A Statement of Appeal Rights has been provided with this letter; see below.

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

Sincerely, 8386171D3B734F4...

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

STATEMENT OF APPEAL RIGHTS

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



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**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

365BOOKSPRO LLC
163 Waterfront Street Suite 300
Oxon Hill, MD 20745

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Melanie Macatangay:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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**Laura Fortman
Commissioner**

10/18/2024

Alldigi Tech Inc.
201 Littleton Rd., Suite 250
Morris Plains, NJ 07950

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Brannon Stacy:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely, A blue bracket-shaped graphic is positioned to the right of the word "Sincerely,". Inside the bracket is a signature in cursive that reads "Luke P. Monahan". Above the signature, the text "DocuSigned by:" is written in a small, sans-serif font.

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**Laura Fortman
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10/18/2024

Capitol Bridge, LLC
671 N Glebe Rd, Suite 1600
Arlington, VA 22203

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Kara Volk:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely, 8386171D3B734F4...

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Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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10/18/2024

Communications Logic, LLC
196 S. Fir St., Suite 170
Ventura, CA 93001

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Soufiane Raddam:

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10/18/2024

Crusecom Technology Consultants LLC
6080 Jet Street
Oscoda MI 48750

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Britt Roberts:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely, A blue bracket-shaped graphic is positioned to the right of the word "Sincerely,". Inside the bracket, the text "DocuSigned by:" is at the top, followed by a handwritten signature "Luke B. Monahan" in black ink. Below the signature, the alphanumeric string "8386171D3B734F4..." is printed in a small font.

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**Laura Fortman
Commissioner**

10/18/2024

DiRAD Technologies, Inc.
9 Corporate Drive
Clifton Park, NY 12065

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear John Michne:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

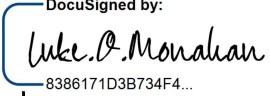
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50 State House Station
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Governor**

**Laura Fortman
Commissioner**

10/18/2024

F.H. Cann & Associates, Inc.
1600 Osgood Street, Suite 3058
North Andover, MA 01845

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear John Webster:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

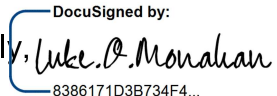
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**Laura Fortman
Commissioner**

10/18/2024

Gatestone & Co. International Inc.
455 N 3rd Street, Suite 260
Phoenix, Arizona 85004

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Spencer Wilson:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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10/18/2024

Maximus US Services, Inc.
1600 Tysons Blvd. #1400
McLean, VA 22102

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Pat Monaghan:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely, A blue DocuSign signature box containing a handwritten signature in cursive that reads "Luke P. Monahan". Above the signature, the text "DocuSigned by:" is visible.

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

STATEMENT OF APPEAL RIGHTS

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



**STATE OF MAINE
DEPARTMENT OF LABOR**

**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

McGhee and Associates LLC
8025 Coronado Coast Street
Las Vegas, Nevada 89113

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Kimberly McGhee:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- SaviLinx LLC

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

Sincerely, 
8386171D3B734F4...

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
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**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

Nagarro Inc.
1737 N. First St., Suite 590
San Jose, CA 95112

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Sanjay Belukar:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
DEPARTMENT OF LABOR**

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Governor**

**Laura Fortman
Commissioner**

10/18/2024

Navient B.P.O. LLC
13865 Sunrise Valley Drive, Suite 100
Herndon, VA 20171

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Ken Duncan:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely, A blue bracket-shaped signature line with the text "DocuSigned by:" above it and a handwritten signature "Luke B. Monahan" in black ink.

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
DEPARTMENT OF LABOR**

**Janet T. Mills
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**Laura Fortman
Commissioner**

10/18/2024

PATLive
1950 Commonwealth Lane, Suite B
Tallahassee, FL 32303

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Jackie Gonzalez:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:


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Sincerely, 8386171D3B734F4...

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
DEPARTMENT OF LABOR**

**Janet T. Mills
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**Laura Fortman
Commissioner**

10/18/2024

Public Consulting Group LLC
148 State Street, 10th Floor
Boston, Massachusetts 02109

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Darnyelle Cmil:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
DEPARTMENT OF LABOR**

**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

SaviLinx, LLC
74 Orion Street Suite 2, Unit 300
Brunswick, ME 04011

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Tom McGraw:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

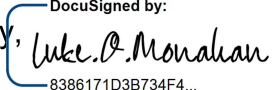
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Sincerely,  DocuSigned by:
8386171D3B734F4...

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
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**Janet T. Mills
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**Laura Fortman
Commissioner**

10/18/2024

ShyftOff Corp.
802 E. Whiting Street
Tampa, FL 33602

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Nate Nammour:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:


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Sincerely, A blue DocuSign signature box containing the text "DocuSigned by:" and a handwritten signature "Luke B. Monahan".

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
DEPARTMENT OF LABOR**

**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

Solix Inc.
10 Lanidex Plaza West
Parsippany, NJ 07054

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Matthew Byrnes:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely, A blue bracket-shaped graphic is positioned to the right of the word "Sincerely,". Inside the bracket is a signature in cursive that reads "Luke P. Monahan". Above the signature, the text "DocuSigned by:" is written in a small, sans-serif font.

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
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**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

The Connection
8500 Normandale Lake Blvd, Suite 350
Bloomington, MN 55437

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Ken Unruh:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely,

DocuSigned by:

Luke P. Monahan

Luke Monahan

8386171D3B734F4...

Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
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Governor**

**Laura Fortman
Commissioner**

10/18/2024

The Midtown Group
1130 Connecticut Ave., Suite 450
Washington, DC 20036

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Molly O'Reilly-Pol:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:


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Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

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**STATE OF MAINE
DEPARTMENT OF LABOR**

**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

Triple Impact Connections, Inc.
4501 Roy J. Smith Drive
Killeen, TX 76543

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear David Sawicki:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Director, Maine Paid Family and Medical Leave Program
50 State House Station
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**STATE OF MAINE
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**Janet T. Mills
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**Laura Fortman
Commissioner**

10/18/2024

Velocitii Contact Center Services LLC
711 Park Ave, Ste 500
Medina, NY 14103

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Bryan Orr:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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**STATE OF MAINE
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**Janet T. Mills
Governor**

**Laura Fortman
Commissioner**

10/18/2024

Working Solutions
6275 W. Piano Pkwy, Suite 550
Piano, TX 75093

SUBJECT: Notice of Conditional Contract Award under RFP # 202409163,
PFML Temporary Call Center Support

Dear Gary Ash:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Labor for PFML Temporary Call Center Support. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

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

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

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

Sincerely,  DocuSigned by:
8386171D3B734F4...

Luke Monahan
Director, Maine Paid Family and Medical Leave Program
50 State House Station
Augusta, Maine 04333

STATEMENT OF APPEAL RIGHTS

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

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 22nd Technology Consultants
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	25
Section III. Proposed Services	35	17
Section IV. Cost Proposal	25	22.08
<u>Total Points</u>	<u>100</u>	<u>64.08</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 22nd Technology Consultants
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 22nd Technology Consultants
DATE: 10/15/2024

EVALUATION OF SECTION II
Organization Qualifications and Experience

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	25

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded 1997. Large national company.
 - Based in West Virginia but notes an office in Portland Maine.
 - References listed – Illinois Secretary of State, Cincinnati Housing Authority, Michigan Road Maintenance.
 - N – No PFML experience, no UI or DOL experience providing employer support.
 - N – No State of Maine Government experience.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Org chart provided
- IV. Litigation
 - None in the previous 5 years.
- V. Financial Viability
 - D&B provided.
 - N - 4 years old.
- VI. Licensure/Certifications
 - Provided.
- VII. Certificate of Insurances
 - Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 22nd Technology Consultants
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	17

Evaluation Team Comments:

- I. Services to be Provided
 - CXConnect Call Management System.
 - Collaboration meetings noted.
 - Notes Portland based office, but unclear what experience they have providing services to Maine companies.
 - Quality assurance live and recorded quality checks.
 - Use AI to guide users.
 - Would leverage Department training resources.
 - N – whole section jargon heavy, impersonal, and generally unclear. Gives concerns about collaboration with the department on short timeframes.
 - Notes huge database of resumes, but unclear what recruitment strategy is beyond that, particularly as it relates to Maine-based staffing.
- II. Work Plan
 - Project plan provided.
 - Says hiring will occur in 5-7 days, may not be realistic.
 - Questions about whether this provider can meet the timelines of rapid deployment.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 22nd Technology Consultants
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	2,197,593	x	25 points	=	22.08

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 365BOOKSPRO LLC
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	17
Section III. Proposed Services	35	5
Section IV. Cost Proposal	25	9.01
<u>Total Points</u>	<u>100</u>	<u>31.01</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 365BOOKSPRO LLC
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 365BOOKSPRO LLC
DATE: 10/15/2024

EVALUATION OF SECTION II
Organization Qualifications and Experience

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	17

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded 2019, based in Maryland.
 - Project references are US Dept of Transportation, Washington Metropolis Transit, and MyAdvisor360 financial reporting.
 - N – No PFML experience.
 - N – No State of Maine Government of Experience. Unclear if they have other large scale state government contracts.
 - N – not a lot of details provided in this section on the company history or qualifications.
 - N – unclear what experience they have beyond the 3 references noted, based on the lack of details in this section.
- II. Subcontractors
 - Global Executive staffing.
- III. Organizational Chart
 - High-level org chart provided.
- IV. Litigation
 - None in the previous 5 years.
- V. Financial Viability
 - D&B provided.
- VI. Licensure/Certifications
 - Addressed.
- VII. Certificate of Insurances
 - Provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: 365BOOKSPRO LLC

DATE: 10/15/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	35	5

Evaluation Team Comments:

- I. Services to be Provided
 - 2 teams of 20 agents – 1 supervisor over 20 agents.
 - Global Executive will do the recruitment.
 - Proposal services note 5 service areas in the abstract (scalable and responsive operations, skilled and empathetic agents, advanced technology integration, quality assurance and continuous improvement, and data-driven transparency) and then provide almost no addition details.
 - N- concerning lack of details or content detailing any type of coherent plan to respond to the business need identified in the RFP.
 - N – not enough details provided on training plan, recruitment plan, quality assurance, what technology system they use.
- II. Work Plan
 - Basic work plan provided on page 5.
 - N – concerning lack of details of how they will achieve the milestones noted.
 - N – says they will implement and test a call management system, but what system is it? Are they building it? Concerning lack of detail on that point to create confidence the tight milestones can be met.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: 365BOOKSPRO LLC
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	5,382,700.80	x	25 points	=	9.01

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Capitol Bridge LLC
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	30
Section III. Proposed Services	35	28
Section IV. Cost Proposal	25	13.31
<u>Total Points</u>	<u>100</u>	<u>71.31</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Capitol Bridge LLC
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Capitol Bridge LLC
DATE: 10/15/2024

EVALUATION OF SECTION II
Organization Qualifications and Experience

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	30

Evaluation Team Comments:

- I. Overview of the Organization
 - 500+ employees, based in VA.
 - References are – Florida Department of Commerce, Washington DC Department of Employment Services (UI call center support), Centers for Medicare and Medicaid Services (worker’s compensation).
 - P – Good government contracting experience, with UI experience in several states. Previous worker’s compensation experience as well.
 - NIST and Fedramp compliant.
 - N – No PFML experience.
 - N – No State of Maine Government experience.
 - N – No state of Maine presence.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Org chart provided.
 - Key positions named and roles defined.
- IV. Litigation
 - 2 current cases pending.
- V. Financial Viability
 - D&B provided.
 - N – Moderate/Higher overall business risk rating.
- VI. Licensure/Certifications
 - Addressed.
- VII. Certificate of Insurances

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Capitol Bridge LLC

DATE: 10/15/2024

- Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Capitol Bridge LLC
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	28

Evaluation Team Comments:

- I. Services to be Provided
 - Amazon Connect call management system.
 - Quality assurance plan well-articulated. 100% of calls recorded.
 - Training plan is well-articulated. Use MS teams for training and coaching of staff.
 - Articulates strategy and experience dealing with escalated clients.
 - Lists out collaboration meetings with Department.
 - Good metrics tracked with real time dashboard provided.
 - N – Recruitment plan not well articulated, particularly as it relates to recruiting Maine based employees with a lack of a current Maine presence.
- II. Work Plan
 - Well-articulated project plan with realistic milestones.
 - Propose phase 2 refine plan after go-live.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Capitol Bridge LLC
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,644,318.08	x	25 points	=	13.31

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Communication Logic
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	17
Section III. Proposed Services	35	16
Section IV. Cost Proposal	25	15.45
<u>Total Points</u>	<u>100</u>	<u>48.45</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Communication Logic
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Communication Logic

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	17

Evaluation Team Comments:

- I. Overview of the Organization
 - References are - Veteran Voices of America, Vietnam Veterans of America, Pet Wellness Direct.
 - N – No PFML experience, no UI or DOL experience with employer support.
 - N – No State of Maine government experience. No large-scale government contracts at all.
 - N – Little business details provided, which in conjunction with the lack of D&B make it hard to assess the viability of this company.
- II. Subcontractors
 - Not answered.
- III. Organizational Chart
 - Provided basic chart.
- IV. Litigation
 - 1 current case over wage dispute.
- V. Financial Viability
 - Unable to provide D&B sheet because no Paydex score. They note they are not disclosing financials until dispute with D&B is resolved.
- VI. Licensure/Certification
 - Addressed.
- VII. Certificate of Insurance
 - Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Communication Logic
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points</u> <u>Availabl</u> <u>e</u>	<u>Points</u> <u>Awarde</u> <u>d</u>
Section III. Proposed Services	35	16

Evaluation Team Comments:

- I. Services to be Provided
 - Unclear what call management system they use.
 - Can do call, email, text support.
 - All calls recorded. Sampling 10% for review and quality assurance scoring.
 - AI-driven knowledge bases – this is a concern for the Department and was not requested in the RFP.
 - Basic training plan and performance management plan articulated. However, there are concerns about using AI for training and knowledge base.
 - N - Recruitment plan not well articulated, particularly as it relates to recruiting Maine employees with no Maine presence.
- II. Work Plan
 - Detailed work plan provided.
 - N – recruitment listed all through December, so unclear if agents would be trained in time for go live.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Communication Logic
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,140,649.72	x	25 points	=	15.45

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Crusecom Technology Consultants LLC
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	17
Section III. Proposed Services	35	14
Section IV. Cost Proposal	25	13.32
<u>Total Points</u>	<u>100</u>	<u>44.32</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Crusecom Technology Consultants LLC
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Crusecom Technology Consultants LLC

DATE: 10/10/2024

EVALUATION OF SECTION II Organization Qualifications and Experience

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	17

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded 2004, based in Michigan.
 - Experience with government contracts with SNAP/WIC.
 - Federal contracts assisting SSA and Veteran programs.
 - References listed were – Michigan (as subcontracted) for SNAP and WIC, FIS Global, and Conduent for California State disbursement unit.
 - Veteran owned business.
 - Disorganized proposal in multiple files, which did not follow directions.
 - N- No PFML experience. No UI or DOL experience supporting employers noted.
 - N – no State of Maine Government experience noted.
- II. Subcontractors
 - MI Call Center, owned by owner of Crusecom.
 - Bonney Staffing for recruitment of Maine call center employees.
- III. Organizational Chart
 - Provided
- IV. Litigation
 - None
- V. Financial Viability
 - D&B provided
- VI. Licensure/Certifications
 - Provided
- VII. Certificate of Insurances
 - Provided

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Crusecom Technology Consultants LLC
DATE: 10/10/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	14

Evaluation Team Comments:

- I. Services to be Provided
 - MI Call center will hire and manage the workforce.
 - Use NICE call management system.
 - Call flow guide kept in Confluence.
 - Use Bonney Staffing for Maine recruiting – 20 agents in Maine, 20 in Michigan.
 - 100% calls recorded but noted that calls deleted after 45 days (retention schedule asked for 10 years).
 - Listed out various software platforms they use – over-focused on these aspects and not services provided.
 - N – responses seem like generic template responses not tailored to Maine specific RFP requirements.
 - N- Overall proposed services appear unclear to this specific RFP/project, which creates concern about meeting the quick set up this project.
- II. Work Plan
 - N - Excel project plan provided, but without enough detail of target dates and steps to achieve the major milestones.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Crusecom Technology Consultants LLC
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,643,379	x	25 points	=	13.32

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: DiRAD Technologies
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	10
Section III. Proposed Services	35	5
Section IV. Cost Proposal	25	11.79
<u>Total Points</u>	<u>100</u>	<u>26.79</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: DiRAD Technologies
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: DiRAD Technologies
DATE: 10/10/2024

EVALUATION OF SECTION II
Organization Qualifications and Experience

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	10

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded 1984. Started specializing government services in 2002.
 - New York with motor vehicles, elections.
 - 3 references are – Memphis gas and water, Convenient MD, Vanguard Direct (for car dealerships).
 - N – no PFML experience, or any DOL experience noted.
 - N – no experience in State of Maine government.
 - N – no experience noted with rapid deployment call centers.
 - N – concerning that references provided were not government contracts for large state programs.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Provided.
- IV. Litigation
 - None
- V. Financial Viability
 - D&B provided.
 - High risk overall – but bidder notes a cash-based business which skews.
- VI. Licensure/Certifications
 - Provided.
- VII. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: DiRAD Technologies

DATE: 10/10/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	35	5

Evaluation Team Comments:

- I. Services to be Provided
 - Acknowledged various requirements but without sufficient detail of how they would achieve.
 - N – severe lack of details in how they would provide services that creates major concerns in their ability to provide services.
 - I/N – AI based reference tools. This is concerning around accuracy of content needed to respond to employers in Maine.
 - Genesys call management system.
 - N - Did not cover quality insurance in detail – specifically if calls recorded, how many reviewed, etc.
 - N - Said they would provide extensive training but without much detail on how. Did note a learning management system.

- II. Work Plan
 - Says they will hire in the first week in December and onboard second week of December.
 - N - Recruitment plan not well articulated to create confidence that staffing could be hired quickly.
 - Computer integration runs into January.
 - Program specific training runs into January.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: DiRAD Technologies
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	÷	4,115,840	x	25 points	=	11.79

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: F.H. Cann and Associates Inc.
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	28
Section III. Proposed Services	35	24
Section IV. Cost Proposal	25	15.93
<u>Total Points</u>	<u>100</u>	<u>67.93</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: F.H. Cann and Associates Inc.
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: F.H. Cann and Associates Inc.

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	28

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded 1999, Women Owned Business.
 - Locations in MA, TX, NH
 - References are – State of New Hampshire Department of Public Health and Human Services, State of Illinois LIHEAP program, US Department of Education Office of Student Financial Aid.
 - Expect to be SOC II Type II certified this fall.
 - P – Good government contract experience, including MA unemployment insurance support.
 - N – no PFML experience.
 - N – no State of Maine government experience.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Org Chart provided.
- IV. Litigation
 - N – Many prior litigations (23 cases) in the previous 5 years. Bidder claims related to collections work which is contentious.
- V. Financial Viability
 - D&B Provided.
- VI. Licensure/Certifications
 - Provided.
- VII. Certificate of Insurances
 - Provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: F.H. Cann and Associates Inc.

DATE: 10/15/2024

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: F.H. Cann and Associates Inc.
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	24

Evaluation Team Comments:

- I. Services to be Provided
 - 35 Tier 1 agents, 5 tier 2 agents. Commits to 75% Maine staffing. Maine staff can work out of Exeter, NH office – would Maine staff want to commute that far?
 - Anticipates 25% of staff will be bilingual in Spanish/English.
 - Inbound and outbound call support.
 - Look for existing agents on other projects to assign at the start of this project.
 - Use MS teams for communications and storing knowledge base.
 - Live call monitoring.
 - The training plan is well-articulated with multiple training techniques.
 - Prior metrics provided on customer service ratings and escalation rates, which are good.
 - Omni Voice call management system.
 - The recruitment plan is not well articulated as it relates to Maine staffing recruitment specifically.
- II. Work Plan
 - Detailed training plan provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: F.H. Cann and Associates Inc.
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,045,474	x	25 points	=	15.93

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Gatestone an Co International Inc
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	15
Section III. Proposed Services	35	10
Section IV. Cost Proposal	25	13.06
<u>Total Points</u>	<u>100</u>	<u>38.06</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Gatestone an Co International Inc
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Gatestone an Co International Inc

DATE: 10/10/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	15

Evaluation Team Comments:

- I. Overview of the Organization
 - Appear to specialize in debt collection.
 - Private sector experience with some government services.
 - Locations in Arizona, Nebraska, and Virginia.
 - References provided are – Canada Government (general inquiry support), Kohls, Citizen's Bank.
 - N – No PFML experience, no UI or DOL experience.
 - N – no State of Maine government experience. Appears no state government experience noted at all.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Provided.
 - Key staff named with bios
- IV. Litigation
 - None
- V. Financial Viability
 - D&B provided.
 - N – Moderate business risk.
- VI. Licensure/Certifications
 - Addressed.
- VII. Certificate of Insurances
 - Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Gatestone an Co International Inc
DATE: 10/10/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	10

Evaluation Team Comments:

- I. Services to be Provided
 - Bidder says they will implement a call monitoring system, but unclear what that system is or how it works. They did say it would be available at least 99% of the time.
 - N – responded to each section just acknowledging the requirements and that they would do it, but without any meaningful details or strategy of how they would provide the services.
 - N-did not describe detailed strategy for recruiting, training, quality assurance, or performance metric measurement and reporting.
 - N – the department does not have confidence the bidder could provide the services requested.
- II. Work Plan
 - Company says they can fully implement in 19 days, but not details of how they would achieve this.
 - Very cursory plan provided that provides little confidence that this company can provide this level of service in the timeframe specified.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Gatestone an Co International Inc
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,715,200	x	25 points	=	13.06

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Maximus US Services Inc.
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35
Section III. Proposed Services	35	32
Section IV. Cost Proposal	25	13.09
<u>Total Points</u>	<u>100</u>	<u>80.09</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Maximus US Services Inc.
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Maximus US Services Inc.

DATE: 10/10/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	35

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded in 1979, headquartered in Virginia.
 - Established company with focus on government services.
 - P – Previous Maine contracts include DHHS OHIM, PFR, DAFS.
 - P – State Government experience across the country.
 - P – experience with quick ramp up.
 - P – office in August allows for hybrid work for Maine based employees.
 - N – no PFML experience specifically.
- II. Subcontractors
 - None.
- III. Organizational Chart
 - Provided.
 - Key staff roles defined and key staff named with bios.
- IV. Litigation
 - N – 14 cases, mostly wage and labor law violation allegations.
- V. Financial Viability
 - D&B provided.
- VI. Licensure/Certifications
 - Provided.
- VII. Certificate of Insurances
 - Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Maximus US Services Inc.
DATE: 10/10/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	32

Evaluation Team Comments:

- I. Services to be Provided
 - Proposal well organized to RFP requirements and plan to provide services was well articulated.
 - Genesys call management system.
 - 100% of calls recorded.
 - P - Office in Augusta can allow for hybrid work for Maine based employees.
 - P - Real time metric tracking with business analytic dashboards that Department can use.
 - P - Well-articulated staffing and recruitment plan, use staffing agencies in Maine and employee referral program from previous Maine agents.
 - Training plan well-articulated – including role playing and mentorship
- II. Work Plan
 - PMI project management framework.
 - Detailed work plan with milestones laid out logically.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Maximus US Services Inc.
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	÷	3,707,360.72	x	25 points	=	13.09

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: McGhee and Associates LLC
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	7
Section III. Proposed Services	35	8
Section IV. Cost Proposal	25	19.54
<u>Total Points</u>	<u>100</u>	<u>34.54</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: McGhee and Associates LLC
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: McGhee and Associates LLC

DATE: 10/10/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	7

Evaluation Team Comments:

I. Overview of the Organization

- Very little detail in this section. Say they have specialized knowledge of similar programs, but specific examples not provided.
- Did have some call center experience during COVID
- Scanned documents with looks of missing information.
- References given are – Sarasota County Florida, Sarasota County Health Department (redundant person and organization to the first reference), and Housing Authority of Baltimore City.
- N – No PFML experience noted. No UI or DOL employer support services noted.
- N – No State of Maine Government experience noted. No large-scale State Government contracts noted.
- N – No Maine experience or current staff noted.

II. Subcontractors

- N - Not answered.

III. Organizational Chart

- High-level basic chart provided.

IV. Litigation

- N - Not addressed.

V. Financial Viability

- N - Not addressed.

VI. Licensure/Certifications

- N - Not answered.

VII. Certificate of Insurances

- Provided, but also provided another certificate for an unrelated client.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: McGhee and Associates LLC
DATE: 10/10/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points</u> <u>Availabl</u> <u>e</u>	<u>Points</u> <u>Awarde</u> <u>d</u>
Section III. Proposed Services	35	8

Evaluation Team Comments:

- I. Services to be Provided
 - Agents would provide their own equipment.
 - Call monitoring provided.
 - Dialpad for Call management service.
 - N - Training plan unclear.
 - N – bidder responses mostly just acknowledge the required scope of work criteria but do not give any details on how they would provide service or what strategies they would use to provide the services. This creates grave concerns about this company providing this level of broad program support.
- II. Work Plan
 - Very basic project work plan provided noting a few bulleted milestones to achieve for month 1, month 2, and ongoing period.
 - N- hiring Maine staff from zero without a good recruitment plan and no Maine experience.
 - N – not enough detail or strategy noted to provide confidence this company can stand up proposed services so quickly.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: McGhee and Associates LLC
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	÷	2,482,600	x	25 points	=	19.54

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Nagarro Inc.
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	23
Section III. Proposed Services	35	18
Section IV. Cost Proposal	25	9.98
<u>Total Points</u>	<u>100</u>	<u>50.98</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Nagarro Inc.
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Nagarro Inc.

DATE: 10/10/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	23

Evaluation Team Comments:

I. Overview of the Organization

- Started in 1999, started public sector client unit in 2013.
- Large company and experience with large clients.
- N – focused to IT helpdesk support, missing robust governmental program support experience.
- N – no PFML experience, no UI/DOL experience with employer support.
- N – no State of Maine government experience.
- References are New York City Department of Education, reference 2 also NYC DOE (redundant), Lufthansa Airlines.

II. Subcontractors

- Nagarro NS Inc Subcontractor

III. Organizational Chart

- Provided.
- Staff roles defined and key staff named.

IV. Litigation

- None.

V. Financial Viability

- Provided D&B.
- N – Moderate business risk.

VI. Licensure/Certifications

- Provided.

VII. Certificate of Insurances

- Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Nagarro Inc.
DATE: 10/10/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	18

Evaluation Team Comments:

- I. Services to be Provided
 - Acknowledges using Department CRM and their NICE VCC call management technology system.
 - Graphics used are a bit opaque in meaning.
 - Training plan mentioned.
 - 20 agents in Maine, 20 in New York.
 - P - Metric tracking looks great.
 - N- proposed services unclear, jargon heavy, and not actually tailored with an understanding of the business need in the RFP.
- II. Work Plan
 - General project timeline table provided.
 - 14 weeks before fully operational – a big concern with timeline of Maine project for 12/30 go live.
 - N – hiring plan for Maine employees unclear and presents concerns they understand unique hiring challenges in Maine.
 - N – work plan does not provide enough detail to provide confidence they can meet our tight timelines.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Nagarro Inc.
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	÷	4,864,000	x	25 points	=	9.98

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Navient BPO LLC
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	31
Section III. Proposed Services	35	28
Section IV. Cost Proposal	25	19.37
<u>Total Points</u>	<u>100</u>	<u>78.37</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Navient BPO LLC
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Navient BPO LLC
DATE: 10/10/2024

EVALUATION OF SECTION II Organization Qualifications and Experience

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	31

Evaluation Team Comments:

- I. Overview of the Organization
 - 50 years' experience in call center support with specialization in government services.
 - Based in New Jersey.
 - Hybrid work approach for work culture and retention.
 - Subsidiary of very large company with plenty of resources.
 - P -Similar government projects – UI programs, rapid deployment, Colorado FAMLI (PFML) experience.
 - N – no State of Maine Government experience, or current Maine presence.
 - References are – NJ Temporary Disability Insurance, Bureau of Labor Statistics, Indiana Department of Workforce Development.
 - i. I/N – Colorado FAMLI program was not used as reference, when it is the most direct analogue to Maine's RFP.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Provided.
 - Project team named and roles defined.
- IV. Litigation
 - One settled case in the previous 5 years
- V. Financial Viability
 - D&B provided.
 - N- Moderate business risk
 N- special event noted page 55 in which Navient barred from servicing federal student loans in a settlement with Consumer Financial Protection Bureau.
 Allegations of misleading and harming borrowers.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Navient BPO LLC

DATE: 10/10/2024

VI. Licensure/Certifications

- Provided.

VII. Certificate of Insurances

- Provided.

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Navient BPO LLC
DATE: 10/10/2024

EVALUATION OF SECTION III Proposed Services

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	35	28

Evaluation Team Comments:

- I. Services to be Provided
 - Responded to all requirements. Good amount of detail without over-explaining.
 - Live and recorded call screening.
 - Proprietary call management system.
 - i. A bit of an unknown for us on performance versus a well-known system.
 - Use of personal devices if authorized by the state.
 - Well-articulated training plan, including role playing.
 - Review scripts every 2 years in general, assume this is negotiable based on Department need.
 - N – metrics and data recording not covered in depth.
- II. Work Plan
 - Plan is well-articulated and seems consistent with rapid deployment experience.
 - Would start preliminary work before the contract signing.
 - Bidder proposes assigning 40 existing agents to meet immediate need, then recruiting 50% Maine staff.
 - N – no Maine staff so must recruit from zero for Maine based employees. Would have to trust that company is successful in recruiting the 50% staffing, without previous Maine-based experience.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Navient BPO LLC
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	2,505,345.45	x	25 points	=	19.37

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: PATLive
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	17
Section III. Proposed Services	35	10
Section IV. Cost Proposal	25	15.69
<u>Total Points</u>	<u>100</u>	<u>42.69</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: PATLive
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: PATLive
DATE: 10/10/2024

EVALUATION OF SECTION II
Organization Qualifications and Experience

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	17

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded in 1987, based in Florida,
 - Private and public sector client experience.
 - References are – Florida Department of State Division of Corporations, Florida Department of Health, Florida Housing Finance Corporation.
 - N – No PFML experience, no UI or DOL employer support experience.
 - N – No State of Maine Government experience, or experience in Maine or Maine presence.
 - N - Experience noted appears in Florida only.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Provided with key staff named
- IV. Litigation
 - N – 2 cases noted settled with one listed as a FMLA denial allegation.
- V. Financial Viability
 - D&B provided.
- VI. Licensure/Certifications
 - Provided.
- VII. Certificate of Insurances
 - Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: PATLive
DATE: 10/10/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	10

Evaluation Team Comments:

- I. Services to be Provided
 - Genesys call management system.
 - 100% of calls recorded.
 - N – very short outline of proposed services. While the bidder appears to acknowledge the requirements of the RFP, they did not sufficient detail about how they would provide such services or what strategies they would utilize.
 - N- no details on how agents would be recruited in Maine so quickly, no details of how agents would be trained, no details of what data metrics are tracked and how they are reported, no details on quality assurance metrics or process.
- II. Work Plan
 - Very basic work plan with broad months as the milestones.
 - N - Not enough detail about specific milestones and how they would achieve proposed services on a such a tight timeline. Concerns this company would not be able to provide this level of service so quickly.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: PATLive
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,091,724	x	25 points	=	15.69

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Public Consulting Group LLC
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	34
Section III. Proposed Services	35	32
Section IV. Cost Proposal	25	12.76
<u>Total Points</u>	<u>100</u>	<u>78.76</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Public Consulting Group LLC
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Public Consulting Group LLC

DATE: 10/15/2024

EVALUATION OF SECTION II Organization Qualifications and Experience

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	34

Evaluation Team Comments:

- I. Overview of the Organization
 - Headquartered in Boston, 2000+ employees.
 - Public sector focus since 1986.
 - References are – State of Maine Office for Family Independence (Medicaid eligibility), Alaska State Department of Health (Medicaid eligibility), Montana State Department of Health and Human Services (Medicaid and Children’s Health Insurance Program).
 - P – great State of Maine experience and experience working with state governments.
 - N – no PFML experience, no DOL experience supporting employers noted.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Org chart provided.
 - Full project team named with bios.
- IV. Litigation
 - N – 17 current and prior litigations in the previous 5 years.
- V. Financial Viability
 - D&B provided.
- VI. Licensure/Certifications
 - Provided.
- VII. Certificate of Insurances
 - Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Public Consulting Group LLC
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	32

Evaluation Team Comments:

- I. Services to be Provided
 - Has a large pool of agents to pull from so can provide 40 agents right from the start.
 - Good list of data reports provided. Real time data dashboard.
 - Amazon Connect call management system.
 - Agents will use their own technology.
 - Training program well outlined, focused on different learning styles.
 - Customer satisfaction measured with automated survey at end of calls.
 - Quality assurance process reviewed with live monitoring of calls and random spot checks of documentation of the agents.
 - Recruitment plan reviewed and noted low attrition rate, particularly among supervisors.
- II. Work Plan
 - Chart provided with 6 stages with milestones.
 - Certified project management professional as project leader.
 - Says hiring will be completed in 18 days.
 - Assumes 11/1 start date.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Public Consulting Group LLC
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,802,428	x	25 points	=	12.76

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: SaviLinx LLC
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none">At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	38
Section III. Proposed Services	35	32
Section IV. Cost Proposal	25	14.51
<u>Total Points</u>	<u>100</u>	<u>84.51</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: SaviLinx LLC
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: SaviLinx LLC

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	38

Evaluation Team Comments:

I. Overview of the Organization

- Founded in 2013.
- P – founded and based in Brunswick, Maine.
- Women Owned Business.
- References are – Massachusetts DFML (same as PFML program), Maine State Department of Labor Unemployment Insurance, Maine State Center for Disease Control.
- P – Very relevant experiences noted with similar programs in Maine and neighboring states.
- P – Massachusetts’s PFML experience will help develop training and scripting resources quickly as they have developed expertise in the field.
- P - rapid deployment experience with Maine SUI program.
- P – proven track record with State of Maine clients, including a recent successful rapid deployment to provide support to the Maine Department of Labor’s State Unemployment Insurance program to assist during COVID customer service backlogs.
- P – Maine based company so well positioned to understand and support Maine businesses in navigating this new program, and well positioned to recruit and retain Maine based employees.

II. Subcontractors

- None.

III. Organizational Chart

- Org chart provided.

IV. Litigation

- P – none in the previous 5 years.

V. Financial Viability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: SaviLinx LLC

DATE: 10/15/2024

- D&B provided.

VI. Licensure/Certifications

- Addressed.

VII. Certificate of Insurances

- Provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: SaviLinx LLC

DATE: 10/15/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	35	32

Evaluation Team Comments:

- I. Services to be Provided
 - Five9 call management system
 - Good analytic reporting with real time data dashboards.
 - Lists out collaboration meetings with Department. Will review top theme with the Department and develop the customer satisfaction measures collaboratively.
 - Random call sampling for quality assurance and agent coaching.
 - The training plan is well-articulated.
 - Trainers will participate in the Department training to become content experts to continue knowledge.
 - P - Recruitment plan well-articulated – can realistically staff 20 Maine staff quickly and on-going. Would start recruitment and planning work before the contract award.
 - Optional services provided.

- II. Work Plan
 - Detailed project plan provided with realistic benchmarks.
 - Responsible positions noted for each work step with important benchmarks to achieve.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: SaviLinx LLC
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,343,722.60	x	25 points	=	14.51

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: ShyftOff Corp.
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	5
Section III. Proposed Services	35	5
Section IV. Cost Proposal	25	25
<u>Total Points</u>	<u>100</u>	<u>35</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: ShyftOff Corp.
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: ShyftOff Corp.

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	5

Evaluation Team Comments:

I. Overview of the Organization

- Staffing built on “gig workers”, business model used for cost savings.
- It is unclear when the company started and how many employees it has. D&B was not provided as requested to verify business information.
- The bidder says it provides services in 35 states, but it is unclear who, besides the 3 references provided.
- References provided are Citizens Insurance of Florida, Hello Heart digital cardiovascular service (no telephone number provided), and National Rural Telecommunications Cooperative.
- N- Very little business information provided creating grave concerns about what the company does and its ability to take on a project of this size and impact.
- N- No PFML experience noted. No government contracts noted.
- N- No State of Maine government experience noted.
- N- No experience setting up rapid recall deployment call centers noted.
- N- Concerns about the staffing model providing the support needed to provide to Maine Employers navigating a large program for the first time.

II. Subcontractors

- None

III. Organizational Chart

- Org chart provided.
- CTO fractional position.

IV. Litigation

- None in the previous 5 years.

V. Financial Viability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: ShyftOff Corp.

DATE: 10/15/2024

- D&B not provided by choice, saying the company will buy it if “considered for the work”.
- N- did not follow basic requirement of this section as it was a requirement to provide the D&B.

VI. Licensure/Certifications

- Addressed.

VII. Certificate of Insurances

- Provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: ShyftOff Corp.

DATE: 10/15/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	35	5

Evaluation Team Comments:

- I. Services to be Provided
 - Did not provide information on RTO and RPO – deferring to their system providers.
 - Gig model of staffing – people doing shift work with full autonomy with when and how much they work.
 - N – AI driven technology to assign agents – the Department has concern about this system.
 - N - Not a lot of discussion about measuring the performance of agents.
 - N - Not a lot of details provided about quality assurance process.
 - N - Not a lot of details were provided on the training plan other than that they use Slack for updates.
 - N – it appears this section is stock language and not tailored at all to the RFP or the business need that the State of Maine is asking for. It's unclear if the bidder understands the business need at all and does not articulate any strategies for meeting the specific requirements of this specific RFP.
 - N – does not discuss process for forecasting call volume, deferring entirely to Department to tell them how much staffing they need on a continuous basis.
- II. Work Plan
 - Basic description of high-level milestones provided.
 - N - Did not provide enough details to describe how they would achieve milestones on such a time timeline.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: ShyftOff Corp.
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	1,940,800	x	25 points	=	25

Evaluation Team Comments:

Bidder provided an hourly rate instead of the overall 1-year cost of proposal. Verified cost of proposal with the bidder given the assumptions outlined in the RFP and Q&A summary as a total 1-year proposal cost of \$1,940,800.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Solix Inc.
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	25
Section III. Proposed Services	35	25
Section IV. Cost Proposal	25	16.45
<u>Total Points</u>	<u>100</u>	<u>66.45</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Solix Inc.
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Solix Inc.
DATE: 10/15/2024

EVALUATION OF SECTION II Organization Qualifications and Experience

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	25

Evaluation Team Comments:

- I. Overview of the Organization
 - Established in 2000 and based in New Jersey.
 - Experience in small business support, healthcare plan enrollment, and low-income assistance programs.
 - Hybrid staffing model.
 - References are – Blue Cross Insurance in Alabama, Morris County in New Jersey (small business grant program), Direct Car Innovations
 - N – No PFML experience, no DOL experience providing employer support.
 - N – No State of Maine Government experience, no other large state contracts.
- II. Subcontractors
 - None.
- III. Organizational Chart
 - Org chart provided.
- IV. Litigation
 - Two prior cases listed for the last 5 years.
- V. Financial Viability
 - D&B provided.
- VI. Licensure/Certifications
 - Addressed.
- VII. Certificate of Insurances
 - Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Solix Inc.
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	25

Evaluation Team Comments:

- I. Services to be Provided
 - NICE inContact call management system.
 - Data dashboards provided as well as traditional data reports.
 - Training plan outline using ADDIE and SAM models of learning.
 - The recruitment strategy would leverage local staffing agencies.
 - Quality assurance and performance management was well articulated.
 - Performance metrics discussed using 4-level new hire report cards.
 - N – not enough details on the recruitment plan as it relates to Maine staffing, particularly given the lack of Maine presence.
- II. Work Plan
 - Provided project plan with detailed milestones.
 - Notes onboarding the first week of November, which seems ambitious.
 - Not enough detail provided of how to achieve milestones that is concerning given the lack of bidder’s experience with government contracts of this size and short timelines.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Solix Inc.
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	2,949,640	x	25 points	=	16.45

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Connection
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	28
Section III. Proposed Services	35	21
Section IV. Cost Proposal	25	15.87
<u>Total Points</u>	<u>100</u>	<u>64.87</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Connection
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: The Connection

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	28

Evaluation Team Comments:

I. Overview of the Organization

- 43 years with customers in the government and private sector. Based in Minnesota.
- References are – Illinois Department of Financial and Professional Regulation, Community and Economic Development Association of Cook County (LIHEAP support), Illinois Department of Commerce and Economic Opportunity (LIHEAP and community block grants).
- Experience with US IRS but did not note them as a reference.
- P – experience with State Government programs and rapid deployment call centers.
- N – No PFML experience. No UI or DOL experience providing support to employers.
- N – No State of Maine Government experience. No current Maine presence and unclear if they have had any previous clients in Maine.

II. Subcontractors

- None

III. Organizational Chart

- Org chart provided.

IV. Litigation

- None in the previous 5 years.

V. Financial Viability

- D&B provided.

VI. Licensure/Certifications

- The bidder appears to have missed this and provided the certificate of insurance as section VI.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: The Connection

DATE: 10/15/2024

VII. Certificate of Insurances

- Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Connection
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	21

Evaluation Team Comments:

- I. Services to be Provided
 - Did not respond to RTO/RPO.
 - Proprietary call management tools.
 - Didn't name the call management system specifically.
 - All calls recorded, live call management, 6% sampling for post calls.
 - Says they will hire 100% of CSRs from Maine, but recruitment plan to achieve this unclear. Especially in absence of Maine presence currently.
 - Would use an internally developed and proprietary knowledge base system.
 - i. N - The Department would like to collaborate to design these and to ultimately own the material.
 - Training plan is well-articulated and includes different types of learning.
- II. Work Plan
 - Detailed work plan provided.
 - Implementation plan seems overly ambitious – plans kick off on week three. Unclear if setting realistic milestones, especially around the Maine agent recruitment without a more articulated plan to recruit these staff.
 - Assumes integration of their system with our CRM system and unclear what their call management system is.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Connection
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,057,084	x	25 points	=	15.87

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Midtown Group
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	20
Section III. Proposed Services	35	15
Section IV. Cost Proposal	25	11.60
<u>Total Points</u>	<u>100</u>	<u>46.60</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Midtown Group
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: The Midtown Group

DATE: 10/10/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	20

Evaluation Team Comments:

I. Overview of the Organization

- Founded in 1989, based in Washington DC.
- Varied government experience, as well as private sector.
- P – Well established company with some government contract experience in various sectors.
- N – No PFML experience, no UI or DOL employer support experience noted.
- N – no State of Maine government experience, and no clear experience in Maine or Maine presence.
- N – Bidder spoke of previous governmental failures as lessons to avoid and offering services they think Maine may want. The overall impression that company not understanding of limitations of government services, especially in Maine.
- References include – US Department of Agriculture, Subcontractor to Maximus for Washington DC government support, Southeastern Pennsylvania Transportation Agency, and FEMA.

II. Subcontractors

- Cloudhesive for technology and security support.

III. Organizational Chart

- Provided.
- Key staff roles defined and key staff named.

IV. Litigation

- None

V. Financial Viability

- D&B provided.
- N – Overall Moderate business risk.
- Provided profit and loss as well, noting distrust in D&B.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: The Midtown Group

DATE: 10/10/2024

VI. Licensure/Certifications

- Provided.

VII. Certificate of Insurances

- Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Midtown Group
DATE: 10/10/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	15

Evaluation Team Comments:

- I. Services to be Provided
 - Amazon Connect for call management – at least 99.99% system availability.
 - P – training plan well articulated.
 - P – up to 25% of staff anticipated to be bilingual.
 - N – unclear what Cloudhesive’s role is.
 - N – very concerned about using generative AI for agent support. Not asked for or desired in this project. Maine is focusing on human connection and support to Maine employers navigating a large new program for the first time.
 - N – concerns about recruitment plan not well tailored to Maine labor market, especially with no Maine experience.
 - N – team generally felt like the bidder did not understand the specific needs of this program and that they felt they knew what Maine needed better than we do.
- II. Work Plan
 - Project plan provided.
 - Project management approach explained.
 - N – concerns about recruitment strategy to build Maine staffing without better articulation of how specifically they can target unique challenges of Maine hiring.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: The Midtown Group
DATE: 10/10/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	÷	4,182,994.40	x	25 points	=	11.60

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Triple Impact Connections Inc.
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	12
Section III. Proposed Services	35	8
Section IV. Cost Proposal	25	16.78
<u>Total Points</u>	<u>100</u>	<u>36.78</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Triple Impact Connections Inc.
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Triple Impact Connections Inc.

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	12

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded 2017. Based in Texas, notes office in Gorham Maine with 4 management staff.
 - Veteran owned. Employs primarily family members of active-duty service members.
 - References include – Pentagon Federal Credit Union, Kipany, Qdoba Mexican Eats.
 - N – multiple files provided for each section, not well organized.
 - N – no PFML experience, no UI or DOL experience focused on employer support.
 - N – no State of Maine Government experience.
 - N – no large state government contracting experience.
- II. Subcontractors
 - Not answered.
- III. Organizational Chart
 - Basic org chart provided.
- IV. Litigation
 - Not answered.
 - N – this is a major omission of the proposal to not have insight into litigation history.
- V. Financial Viability
 - D&B provided.
 - N- Overall moderate business risk rating.
- VI. Licensure/Certifications
 - Not addressed.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Triple Impact Connections Inc.

DATE: 10/15/2024

VII. Certificate of Insurances

- Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Triple Impact Connections Inc.
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	8

Evaluation Team Comments:

- I. Services to be Provided
 - Notes 100% system availability.
 - On board agents “in waves” – creates concern if 40 staff can be hired and onboarded for initial roll out.
 - NICE CX Call Management system.
 - Metrics tracked and emailed daily along with weekly and monthly reports. Does not appear to provide data dashboard.
 - Does not appear they have a dedicated training manager.
 - N – proposed services 3 pages in total without a sufficient level of detail provided to create confidence services could be provided of a project of this scope and impact.
 - N- no in-depth strategy for training, quality assurance, and recruiting articulated. Of particular concern is the lack of strategy as it relates to meeting the 50% staffing with Maine based employees on a short time frame.
- II. Work Plan
 - General excel spread sheet plan provided with milestones listed, but all milestones dates listed as “due 12/1” which creates concerns they do not have in depth plan to achieve these milestones in a sequential and realistic way.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Triple Impact Connections Inc.
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	2,892,040	x	25 points	=	16.78

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Velocitii Contact Services
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	15
Section III. Proposed Services	35	12
Section IV. Cost Proposal	25	15.89
<u>Total Points</u>	<u>100</u>	<u>42.89</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Velocitii Contact Services
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Velocitii Contact Services

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	15

Evaluation Team Comments:

I. Overview of the Organization

- Founded 2014. Based in NY.
- Have agents currently in NY, FL, PA, TX, and SC. Utilizes remote work strategy.
- References include – Casella Waste management, Wellabe (insurance), Hagerty (car insurance).
- N – no PFML experience, No UI or DOL experience with employer support.
- N – No state of Maine government experience, no large government contract experience.

II. Subcontractors

- None

III. Organizational Chart

- Org chart provided.
- Key executive staff named along with qualifications.
- Staff roles defined.

IV. Litigation

- Notes no current litigation.

V. Financial Viability

- Only a partial report provided, and it does not have a D&B overall business risk rating shown.
- N – concerns about lack of financial data for this company.

VI. Licensure/Certifications

- Addressed.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Velocitii Contact Services

DATE: 10/15/2024

VII. Certificate of Insurances

- Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Velocitii Contact Services
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	12

Evaluation Team Comments:

- I. Services to be Provided
 - A lot of focus on how they build employee retention and company culture.
 - Less details on how they would provide the specific services requested in this RFP.
 - Five9 Call management system.
 - Customer satisfaction measured with after-call surveys.
 - Will develop KPIs with the Department, gave some examples of KPIs that could be tracked.
 - Training plan and performance management plan of agents well-articulated.
 - N - Not enough detail on recruitment strategy, especially as it relates to Maine based employees.
- II. Work Plan
 - Project plan provided, but without sufficient details of how they would achieve the specific milestones.
 - Assuming Department has all training documents and knowledge base established.
 - N – concerns about this company delivering the requesting services of a project of this scope and impact within the tight timelines, especially given the lack of experience with government projects and clients.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Velocitii Contact Services
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,057,600	x	25 points	=	15.89

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Working Solutions
DATE: 10/15/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan
Names of Evaluators: Luke Monahan, Judith Shaw, Rene Leblanc

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	10
Section III. Proposed Services	35	10
Section IV. Cost Proposal	25	16.02
<u>Total Points</u>	<u>100</u>	<u>36.02</u>

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Working Solutions
DATE: 10/15/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

Bidder provided attestation to provide at least 50% of staffing with Maine-based employees.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Working Solutions

DATE: 10/15/2024

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	40	10

Evaluation Team Comments:

I. Overview of the Organization

- 27 years in business. Women owned business.
- Mostly remote workforce, including 100% remote agents.
- Clients include Toyota, Southwest Airlines, Boscov, and Medline. Health care and benefits 10% of clients.
- References are – Intuit Turbo Tax, FedPoint (employee benefit programs), Toyota Connected.
- N – No PFML experience, no UI or DOL experience focused on employer
- N – No State of Maine government experience, no large-scale government contract experience.
- N – No rapid deployment call center experience.
- N – File 2 poorly organized with the ordering of the documents.

II. Subcontractors

- None

III. Organizational Chart

- List of Executive staff name and titles provided.
- Key staff roles defined. Some key staff named.

IV. Litigation

- None in the previous 5 years.

V. Financial Viability

- D&B not provided by choice.
- N – this is against the requirement of RFP and creates major concerns about the lack of financial data of the company.

VI. Licensure/Certifications

- Addressed.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: #202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER: Working Solutions

DATE: 10/15/2024

VII. Certificate of Insurances

- Provided.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Working Solutions
DATE: 10/15/2024

EVALUATION OF SECTION III
Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	10

Evaluation Team Comments:

- I. Services to be Provided
 - AI based recruitment. The Department has concerns about this, particularly as it related to recruiting Maine based employees.
 - “will build expertise in PFML” – as they do not have have prior experience in the field or a content expert on the project team.
 - Training program well-articulated.
 - QA and performance management are well-articulated.
 - Bright Pattern call management system.
 - Recruitment plan not well articulated, particularly as it relates to hiring Maine based employees.
- II. Work Plan
 - Sample implementation provided.
 - N – extremely concerning that the company has not identified project milestones and timeline for this RFP and how they would meet those milestones on short a short time frame. This is especially concerning given the lack of experience in large-scale government or public sector contracts.

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Working Solutions
DATE: 10/15/2024

EVALUATION OF SECTION IV
Cost Proposal

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
1,940,800	,	3,028,940	x	25 points	=	16.02

Evaluation Team Comments:

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Alldigi Tech Inc.
DATE: 10/10/2024

SUMMARY PAGE

Department Name: Department of Labor
Name of RFP Coordinator: Luke Monahan

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• At least 50% staffing provided by Maine workers		X

STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES

RFP #: #202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER: Alldigi Tech Inc.
DATE: 10/10/2024

OVERVIEW OF SECTION I
Preliminary Information

Section I. Preliminary Information

Evaluation Team Comments:

The bidder failed to provide attestation in Section I that they would provide 50% of staffing with Maine-based employees. Additionally – the Preliminary Information Section was missing most required information, Proposed Services (file 3) was not provided at all, and the Cost Proposal was incorrectly submitted. This proposal is disqualified.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: 22nd Century
DATE: 10/7/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Top Secret Security from DOD
- SOC Type 2 certification
- Fedramp certified
- Main facility in VA, but have remote "Work From Home" capabilities.
-

2. Subcontractors

- None
-
-

3. Organizational Chart

- Provided.

4. Litigation

- None

5. Financials

- D&B Provided

6. Etc.

II. Proposed Services

1. Services to be Provided

- M-F 8-5 excluding SOM Holidays

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 22nd Century

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Registration, PW Resets and General Questions
 1. Logging all interactions in PFML CRM database.
 2. Daily meetings with Engagement Mgr and SOM staff.
- Have dedicated work center in Portland ME.
- Also referenced their VA call center
-
- 2. Implementation – Work Plan
 - 60 days to get operational (12 weeks)
 1. It's not clear if that is sequential or if there are items that can be done in parallel.
 2. Will they be able to be ready Jan 1?
 - A very well written and comprehensive discussion on what they will do. I just wish we had a timeline / Gantt chart so we could see the actual path to being ready.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 365 Books Pro

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Partner with Global Executive Staffing to allow quick scalability.
- Experience providing solutions to government and private clients.
- “demonstrated expertise in federal compliance, security clearances, call center management, and financial reporting”
-

2. Subcontractors

- 365BooksPro and GES are teaming on the delivery.
- There are no subcontractors
-

3. Organizational Chart

- Provided.

4. Litigation

- None

5. Financials

- D&B Provided

6. Etc.

II. Proposed Services

1. Services to be Provided

- Scalable Solution

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 365 Books Pro

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- 40 CS agents to start.
- I did not see hours / days for support
- I did not see a reference to in-state resources.
-

2. Implementation – Work Plan

- 4 Weeks to launch
- A very well laid out plan detailing what will happen Month 2 (go-live), Months 3-6 and then at 1 year

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capital Bridge

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Provided services to several state DOL clients
 - 1. UI for FL, KS and DC.

•

2. Subcontractors

- None needed.

3. Organizational Chart

- Provided.

4. Litigation

- 2 personnel related filings.

5. Financials

- D&B Provided

6. Etc.

- I liked this one.

II. Proposed Services

1. Services to be Provided

- 8-5 M-F excluding SOM Holidays
- Staff at both a contact center and Work at Home
- Discussed how they would staff and the selection criteria (patience, professionally satisfy frustrated callers, etc).

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capital Bridge

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Will provide inbound call support
 - Can provide outbound calling campaigns if desired.
 - Provides logging and reporting
 - Has QA monitoring built into their services
 - Will conduct daily telephone meetings with DOL staff for updates and issue escalation.
 -
2. Implementation – Work Plan
- Start 12/2/24 and go live 12/30/24.
 - Do a phase two to refine processes.
 - A very well laid out plan detailing what will happen when

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Combines AI analytics and integrated CRM systems.
 - 1. AI powered WIKI for agents
- Short introduction, but to the point.

2. Subcontractors

- Not answered.

3. Organizational Chart

- Provided.

4. Litigation

- 1 wage dispute

5. Financials

- Not Provided

6. Etc.

II. Proposed Services

1. Services to be Provided

- Can integrate voice, email and text messages into one experience and log the entire transaction
- Start with 40 agents, 50% based in Maine.
 - 1. Will expand to meet high volume periods
 - 2. The response to 1.4 has typos.
- Agents will undergo a 5 day onboarding program.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Discussed data retention
- Discussed security
- Discussed monitoring
- Weekly collaboration meetings
- Much more detail in this section than in the qualification section
- Section 6.3, proven expertices in Maine... Typo.
- 2. AI driven knowledge base. Good or bad?
-

2. Implementation – Work Plan

- Go live 12/30/24.
- Laid out a full year of enhancements.
- A very well laid out plan detailing what will happen when

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- First statement is they are a disabled veteran owned company and the second statement is they use US Drug Testing for employee screening
- Holds month meetings with clients
- Uses Confluence to have call flow guides.
- They use Bonney Staffing out of Bangor to staff call centers.
- Maine based business include:
 1. PCG in Augusta
 2. SDI in Augusta
 3. Carbonite in Lewiston
 4. Delhaize in Southern ME and NC
- They had 11 different file 2's, which probably contained the rest of the required information, but it wasn't in one file, so it wasn't reviewed.
-

2. Subcontractors

- I don't know if they are partners or subs, but they use:
 1. Ring Central NICE
 2. NICE CXone
 3. Atlassian Confluence
 4. Time Clock Plus
 5. Time Doctor
 6. Data Loss Prevention
 7. DUO Multifactor Authenticatoin

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom

DATE: 10/7/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

8. NICE inContract
 - Then the did list the following Subcontractors
 1. MI Call Center Inc. in MI
 2. Bonney Staffing in ME
3. Organizational Chart
 - They had 11 different file 2's, 1 of which was this. Was not part of the main file. It was OK.
4. Litigation
 - Not in the file, but separate file attested there are none
5. Financials
 - They had 11 different file 2's, none of which seemed to be this.
6. Etc.

II. Proposed Services

1. Services to be Provided
 - 24x7x365 operations
 - Section 2, Staffing Plan and training:
 1. 20 SOM agents
 2. 20 agents from what might mean Michigan? That sentence was messed up.
 - MI Call Center will hire and manage the workforce
 - Provided a good overview of developing training curriculum
 - Will use IVR and ACD systems for call routing
 - Will develop a call flow guide to be stored in Confluence
 - Provided far too much detail in the steps they would take, and not enough in what they will actually do
 -
2. Implementation – Work Plan
 - Included an Excel sheet that was not part of File 3. Did not follow directions. In that sheet:
 1. Go live 12/27/24.
 2. Laid out a plan for improvement, but all the dates in the Go Live Deployment was 12/27/24.
 3. Ongoing optimization through 1/31/25. But nothing longer than that

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: DiRAD

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Been in providing call center services since 2002.
- First page skips any business overview to make a statement that they didn't like their D&B report then cited they are a woman-owned company.
 1. Shouldn't their business practices and experience be the first thing?
- Appendix C lists their qualifications, which were good, but not a lot of details.
-

2. Subcontractors

1. None.

3. Organizational Chart

- Provided

4. Litigation

- None

5. Financials

- D&B provided, but they took exceptions to it multiple times.

6. Etc.

- They did provide 3 references. One had 3 sentences, the other two had 1 sentence.

II. Proposed Services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: DiRAD

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

1. Services to be Provided
 - They took the requirements from the RFP and answered each one.
 1. This made it much simpler to determine if they agreed to and planned for each one.
 2. But no details on what they would provide or do.
 - There were none they did not agree to.
 -
2. Implementation – Work Plan
 - Go-Live in 5 weeks
 - Ongoing training and QA through week 11.
 - Training Materials and business training after January 1.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: FH Cann

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Opening statement (cover letter?) detailed a lot about the company, how they do business.
 - 1. It then pointed out that they are a Woman Owned company, which is fine information since they had already detailed the company.
 - a. Many companies list these types of details before their company's ability or qualifications.
- Detailed their commitment to adapting to evolving needs.
- Listed industry recognitions
- 78% of workforce is female. 76% are minorities.
- Expect to be SOC 2 Type II compliant in October 2024.
-

2. Subcontractors

- 1. None.

3. Organizational Chart

- Provided

4. Litigation

- None for their call centers

5. Financials

- D&B provided

6. Etc.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: FH Cann

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

II. Proposed Services

1. Services to be Provided

- 8-5 M-F availability
- Can provide outbound call services if desired
- I liked how they responded to each requirement.
 1. Descriptions were complete, but not too long.
- They detailed their approach to scale the size of their team if/when it is necessary.
-

2. Implementation – Work Plan

- They included a Gantt Chart that was very confusing
- Go Live is 12/31/2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: Gatestone
DATE: 10/8/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Has been providing contact center services since 1926.
- 3 offices in US, 4 in Canada, 3 in Latin America and 3 off shore.
- Expect to be SOC 2 Type II compliant in October 2024.
-

2. Subcontractors

1. None.

3. Organizational Chart

- Provided with brief description of each role.

4. Litigation

- None to disclose(?)

5. Financials

- D&B provided

6. Etc.

- 3 projects listed. OK descriptions without overloading you with information.

II. Proposed Services

1. Services to be Provided

- I really liked the format for their response.
- No real descriptions for what they would do or provide.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Gatestone

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- I didn't see them take exception to any of the requirements.
-
- 2. Implementation – Work Plan
 - I did not like the way they laid out the workplan
 1. Their introduction said it would take 19 days to implement, which will meet the need, but is that thorough?
 2. They have 3 phases. Based on their 19 days, there has to be overlap but it is not apparent where that is.
 - They said the assumed start would be November. ?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus

DATE: 10/9/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Has worked with SOM since 1992 including with:
 1. DHHS
 2. BoI
 3. DoC
 4. DAFS
 5. DOE
- Very good write up on their background and services
-

2. Subcontractors

1. None.

3. Organizational Chart

- Provided with brief description of each role as well as bios on the leads proposed.

4. Litigation

- Many listed. Most due to wages and compensation

5. Financials

- D&B provided

6. Etc.

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus

DATE: 10/9/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- I really liked the format for their response.
- I didn't see them take exception to any of the requirements.
- They noted how our call volumes would likely fluctuate differently that in the RFP and how they could help us accommodate them.
-

2. Implementation – Work Plan

- They provided a Gantt chart with a go-live of 12/30/24
- They also included post go-live activities which was useful.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: McGhee
DATE: 10/9/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- The documents were scanned. Did they submit paper?
- Very little background on organization.
- Followed directions and gave a brief description of qualifications.
-

2. Subcontractors

1. Did not answer.

3. Organizational Chart

- Provided basic chart

4. Litigation

- Not provided

5. Financials

- Not provided

6. Etc.

II. Proposed Services

1. Services to be Provided

- Identified how they will staff and monitor
- Cloud hosted solution which interfaces with their CRM
- 99.99% up time
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: McGhee

DATE: 10/9/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

2. Implementation – Work Plan

- Didn't provide anything useful
- 1 page with 3 graphics showing 2 months to go live and one month of transition
- They likely won't have 2 months to implement.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: Midtown
DATE: 10/9/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- I think they used the same graphic as a previous bidder
- Sounds like a good experience basis.
- Sounded like they were wishy-washy about having SOM resources available on day 1. Page 6 "Large Pool of Qualified Contractors:"
-

2. Subcontractors

- CloudHesive – They said a lot about the company, but did not say what their function would be for this engagement. They have a lot of AI and Language abilities so that may be what they are for.

3. Organizational Chart

- Provided along with a brief description of several functions

4. Litigation

- None

5. Financials

- D&B provided as well as their financial statements.

6. Etc.

II. Proposed Services

1. Services to be Provided

- Had a good description of their understanding about how important good initial customer support is to the success of a new major initiative.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Midtown

DATE: 10/9/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Identified how they will staff, monitor, and adjust services based on needs.
- Cloud hosted solution which interfaces with their CRM
- They included a call and data flow diagram.
-

2. Implementation – Work Plan

- They discussed using a program management approach to implementation
- They cited a 3 week window from award to go live, with full operations in 5 weeks.
- They provided a long list of “Workstream Elements” with Start and Finish months. No dates.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: Nagarro
DATE: 10/9/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Their NDA statement is a worry. If we award to them, the other bidders have the right to challenge. I think they can be given the proposal. Would that disqualify them?
- First section, second paragraph, typo
- Gave 5 examples of current clients
- Have experience with large audiences
- Provide both Level 1 and Level 2 support
-

2. Subcontractors

- The plan to use an affiliate, Nagarro GS Inc.

3. Organizational Chart

- Provided a graphic which showed Maine and Nagarro and how different levels of business will interact. They also provided bios for senior level people in their organization.

4. Litigation

- None

5. Financials

- D&B provided as well as their financial statements.

6. Etc.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro

DATE: 10/9/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

II. Proposed Services

1. Services to be Provided

- Inbound and outbound calls 8-5 M-F excluding State holidays.
- Expect to use SOM's CRM for logging all information.
- Bad Sentence: "We plan to have operations managed through Maine and New York City these sites will act as a fallback in case of any disaster recovery required. "
- Provided a graphic detailing the operations processes. Didn't convey much.
- Page 6, first sentence. Typo.
- They provided a lot of detail on every requirement.
- In this section, they said they have not engaged any subcontractors which conflicts with their statement in the qualification section.
-

2. Implementation – Work Plan

- 5 phases provided
- It appears 14 weeks until they are operational.
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient

DATE: 10/9/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Their NDA statement is a worry. If we award to them, the other bidders have the right to challenge. I think they can be given the proposal. Would that disqualify them? I think this one is worded more flexible than Navarro
- 50 years experience in customer service.
 - 1. State agencies include IN, NJ and NY.
- Experience providing tier 1 and tier 2 support.
- Made special note that they recognize we are only looking for Tier 1 support.
- They provided Colorado's call center for their PFML in 2021.
-

2. Subcontractors

- None

3. Organizational Chart

- Provided along with brief overview of key personnel.

4. Litigation

- 1 discrimination case in 2022.

5. Financials

- D&B provided.

6. Etc.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient

DATE: 10/9/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

II. Proposed Services

1. Services to be Provided

- Inbound and outbound calls 8-5 M-F excluding State holidays.
- They provided an appropriate amount of detail in their responses.
- I liked how they formatted this section.
-

2. Implementation – Work Plan

- They provided a lot of detail on their approach to staffing and how they would posture to be flexible if staffing needs changed.
- They provided a plan for how they would build their services.
- 5 phases provided
- Based on a start date of 11/1, they forecasted being ready to go live 12/30.
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: PATLive
DATE: 10/10/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 34 years experience in customer service.
- Able to quickly staff up
- Brief overview, but comprehensive.
- All clients in FL
 1. No PFML
 2. No Labor related

•

2. Subcontractors

- None

3. Organizational Chart

- Provided.

4. Litigation

- 2 wrongful termination.
 1. One was denial of FMLA

5. Financials

- D&B provided.

6. Etc.

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: PATLive

DATE: 10/10/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Dedicated workforce manager to analyze call patterns.
- CSAs will have 40 hours of training.
- No details on how staffing will be obtained
-

2. Implementation – Work Plan

- No Details
- No Dates
 1. Starts November
 2. Go-Live January

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Good Introduction
 1. Noted they have experience in Maine.
- Currently supporting OFI since Jan 2023
 1. 160 full time virtual staff members.
- 3 projects identified
 1. All state government
 2. All DHHS
-

2. Subcontractors

1. None.

3. Organizational Chart

- Provided

4. Litigation

- 17 cases
 1. Most were related to medical reimbursement claims

5. Financials

- D&B provided

6. Etc.

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Answered A-K of requirements in one long blurb. Note that the order went a, i, b,c, d, etc.
- Has robust pool of resources to pull from to allow providing 40 CS specialists at start.
- Answered 25 years of experience wholly focused on public servants (that should have been in their qualifications file).
- Didn't see where they specifically agreed to the hours.
- Gave a good list of reports currently provided to other projects.
- Provided option to use AI for advanced analytics, but it's not a core focus.
- They discussed their internal SW and how they would use it.
- Presented their methodology for script development.
- Good Staffing/training outline
-

2. Implementation – Work Plan

- Provided a chart of 6 stages with milestone dates.
- They assumed an 11/1 start date.
- All staff hired in 18 days
- Go Live 12/27.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: SaviLinx

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Woman owned small business in Brunswick ME.
- 11 years experience
- Extensive experience in implementing and perating statewide PFML programs
 1. Worked with Mass PFML since 2020.
 2. Technical and operational staff that have worked closely with MDOL.
- Provided phone support to BUC during COVID in 2020.
- Also provided support to MeCDC during COVID starting March 2021.
-

2. Subcontractors

1. None.

3. Organizational Chart

- Provided

4. Litigation

- None

5. Financials

- D&B provided

6. Etc.

II. Proposed Services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: SaviLinx

DATE: 10/8/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

1. Services to be Provided

- Proposed 2 stage implementation
 1. Pre-launch planning and implementation
 2. Training, Launch and initial implementation
- Offered optional services based on their experience in supporting Mass.
- Plan to partner with DOL to establish IVR Telephony
 1. Soundes like they meant they expected us to set it up
 2. Later, in Technology, they identified they will provide Five9 Telephony.
- Provided discussion on their reporting as well as review metricx
 1. Also provided sample QA report
 2. Also provided a sample of the Actionable Insights dashboard
-

2. Implementation – Work Plan

- Provided a Gantt chart.
- They assumed an award date of 11/1, and contract finalization on 11/22.
- Go Live 12/30.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: ShyftOff
DATE: 10/14/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Powered by "gig workers". What does that mean?
- Ability for Maine to quickly ramp up/down staffing depending on needs
 1. Sounds like overhead for us to manage
 2. Doesn't sound like their "gig" CSRs are dedicated to PFML.
- Reference projects were all business
 1. Sounds like they are small most of the time.
 2. One has to be able to quickly scale up for insurance purposes.
-

2. Subcontractors

1. None.

3. Organizational Chart

- Provided with brief bios of senior management

4. Litigation

- None

5. Financials

- Did not provide but would purchase if considered for this work

6. Etc.

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: ShyftOff

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Forte is still described as “gig” based with fluctuating staffing capabilities.
- Scalability
- Uses AI-driven technology to assign agents
 1. Doesn’t appear to have dedicated staffing.
-
- 2. Implementation – Work Plan
 - Did not provide
 - Discussed methodologies and different steps, but did not include times/dates of a plan to meet the need.
 - They did not provide a go-live date.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: Solix
DATE: 10/14/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Established in 2000, but has provided care for 30 years (?)
- HIPAA compliant
- SOC certification
- Will provide reporting dashboard
- One small county project is only government experience
- Large Blue Cross/Blue Shield insurance experience
- Use Hybrid model to have dedicated resources during high call volume periods and shared resources for off-peak hours.
 1. Probably would not pertain to our 8-5 requirement, so why include it?

•

2. Subcontractors

1. None.

3. Organizational Chart

- Provided but no descriptions

4. Litigation

- 2 cases. Neither sound like they would be pertinent to us.

5. Financials

- D&B Provided

6. Etc.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Solix

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

II. Proposed Services

1. Services to be Provided

- Daily, weekly and monthly reporting
- Provided lots of sample reports
- Made a note that they use IVR response to reduce the number of actual calls.
-

2. Implementation – Work Plan

- Did provide a chart showing stages

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: The Connection

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 43 years experience delivering contact center solutions
- Say they have "extensive experience working with state governments".
- Partnered with IRS to provide over 500 CSRs in less than 40 days.
- 3 reference projects,
 1. All state government
 2. All in Illinois

•

2. Subcontractors

1. None.

3. Organizational Chart

- Provided but:
 1. No people identified
 2. Descriptions several roles, but not detailed enough to have value.

4. Litigation

- None

5. Financials

- D&B Provided

6. Etc.

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: The Connection

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

- Goal is to hire 100% of CSRs from Maine
 - Experience in both Brick & Mortar as well as work from home engagements.
 - It was difficult to map our requirements to what they proposed
 - Bi-monthly reporting and communications – long gap
 - They did identify the core team (4 people) who would be our partners
 -
2. Implementation – Work Plan
- Identified a 3 week go live plan
 - Included plans for optimization and enhancements that lasted for 12 months.
 -

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: Triple Impact Connections
DATE: 10/14/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Provided ZIP files with multiple files for each "file" they were supposed to provide.
- Veteran owned and primarily hires spouses of military members.
- No state or federal government referenced.
- Not an organization document that stands out as a contender.
-

2. Subcontractors

1. None.

3. Organizational Chart

- Provided as a separate file of a power point.

1. Not of value

4. Litigation

- Not answered

5. Financials

- D&B Provided in a separate file that was not clearly labeled

6. Etc.

II. Proposed Services

1. Services to be Provided

- Said they will staff a team of 40 CSR.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Triple Impact Connections

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

1. Selected based on experience serving similar customer support programs
2. Did not reference hiring any from Maine.
 - Made the same statement in 2 different places.
 -
2. Implementation – Work Plan
 - Provided an excel sheet as a separate document.
 - All due dates were 12/1/2024
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: Velociti
DATE: 10/14/2024
EVALUATOR NAME: Rene LeBlanc
EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Provided brief anecdote of why they were formed.
 - Moved to a work from home strategy during the pandemic
 - Strive to hire CSRs from the home state of their engagement.
 - Currently in NY, FL, PA, TX and SC
 - Spent a lot of time on their services to their employees.
 - Provided bios of executive leadership in the intro.
 - No government experience cited
 - No Labor experience cited
 -
 - 2. Subcontractors
 - 1. None.
 - 3. Organizational Chart
 - Provided with more bios on roles specific to the engagement.
 - 4. Litigation
 - None
 - 5. Financials
 - D&B Provided
 - 6. Etc.

II. Proposed Services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Velocitii

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

1. Services to be Provided

- Answered in the context of how they approached their HR.
 1. First item was how they hired
 2. How they managed tracked to retention
- Jumped into employee life cycle and training
- Then discussed how they onboard a new client
- Didn't propose a plan, but more of an if-then-else approach to defining what they would do.
-

2. Implementation – Work Plan

- Provided Gantt Chart.
- Go live the last week of December
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

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 Lead Evaluator for this RFP.

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Did not provide organization information until Appendix C at the end
 1. Very poor organization
 2. Missed opportunity to make a good impression of their organization.
- Woman owned company
- No Government experience
- No Labor experience
-
- Provided brief anecdote of why they were formed.
- Moved to a work from home strategy during the pandemic
- Strive to hire CSRs from the home state of their engagement.
- Currently in NY, FL, PA, TX and SC
- Spent a lot of time on their services to their employees.
- Provided bios of executive leadership in the intro.
- No government experience cited
- No Labor experience cited
-

2. Subcontractors

1. Not answered in a manner I could find.

3. Organizational Chart

- Provided with bios on roles specific to the engagement.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: 10/14/2024

EVALUATOR NAME: Rene LeBlanc

EVALUATOR DEPARTMENT: MaineIT

4. Litigation
 - None
5. Financials
 - D&B number provided but no details
6. Etc.

II. Proposed Services

1. Services to be Provided
 - Will build expertise in PFML (in other words, no experience)
 - Will support 8-5 M-F
 - Use PowerBI for reporting
 -
 -
 - Answered in the context of how they approached their HR.
 1. First item was how they hired
 2. How they managed tracked to retention
 - Jumped into employee life cycle and training
 - Then discussed how they onboard a new client
 - Didn't propose a plan, but more of an if-then-else approach to defining what they would do.
 -
2. Implementation – Work Plan
 - Gave a sample implementation plan.
 - Didn't speak to our needs or timelines specified in the RFP

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 22nd Century

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. LLC founded in 1997 and located in McLean, Virginia

ii. Background

1. Clients in all 50 states; public sector focus; current contracts with 39 states; resume database over 1 million call center professionals including over 2000 local to Maine
2. Local office in Portland, Maine – helps manage local agents and provide support for client

iii. Project Examples

1. Illinois Secretary of State (inquiries regarding motor vehicles and corporate filings); The Charter County of Wayne, Michigan Department of Public Services (internal customer service for public works employees); Cincinnati Metropolitan Housing Authority, Ohio (applicants, landlords, tenants, information about the program)
2. Examples given other than Illinois are small projects; don't map to the PFML program – note call hold time for Ohio project did go down from 60 minutes to 7 minutes but still high; question what the abandonment rate is
3. If have clients in all 50 states, why did the bidder not mention any Maine project (current or past)

b. Subcontractors

None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 22nd Century

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- c. Organizational Chart
 - i. Provided and appropriate for this project
- d. Litigation
 - i. Current - None
 - ii. Past 5 years - None
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – Provided – note that it is over 4 years old; based on information no concerns about financial viability
- f. Licensure/Certification – Provided 2024 annual report filed with Maine Secretary of State
- g. Certificate of Insurance
Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability 99%
 - 2. Recovery Time Objective defined at time outage occurs
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 as required; all remote; equipment will be provided
 - b. Database of resumes allows to scale up quickly; keep 20 to 30 agents available as backup for each project
 - c. Appears some will be located at their call center in West Virginia
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Current pool of resumes from 2000+ Maine based agents; detailed staffing process; bidder has own Staffing Center with recruiters and data miners that

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 22nd Century

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

built the data base with over a million resumes; will also use job sites like LinkedIn, Indeed, etc.

- b. Center for Employee Development responsible for training methodologies and tools; scripting

iii. Process for measuring performance

1. Track using standard industry metrics; quality scores and trend analysis to be provided to Department
2. Live monitoring including plugging into the agent's system to see both sides of the interaction in real time; agents do self-assessments; mentoring
3. 100% of calls recorded – monitor random number of calls per month; also monitor live calls – can coach agent or take over the call
4. Screen capture – review screen activity in conjunction with relevant call recording

Note that these metrics will be developed post award as part of the contract negotiations

iv. Vendor system for managing call queues and quality assurance

1. CXConnect (in-house system – basically a hub) – workflows, dashboards, reports, schedule tracking and forecasting, resources like scripts; AI chatbot
2. Interactive voice response; automatic call distribution
3. Heavy reliance on AI including to “guide users through complex processes”

v. Training Plan

1. Leverage materials provided by the Department
2. Initial and ongoing training covering soft skills, confidentiality, data security, de-escalation techniques (good point), active listening; role playing
3. Note that phonetic, linguistic and cultural training is available in-house
4. New hire training – 4 weeks

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 22nd Century

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

b. Implementation Plan

- i. Project Team as per org chart; use approach of the Project Management Institute; director of engagement and quality assurance manager are certified project management professionals

ii. Steps and Tasks

- 1. 15 days for start-up and Go Live
- 2. 15 days for pre-engagement which is internal planning, finalizing project team, culling agents from database who can fit the needs for the project
- 3. Assumes 5-7 days to staff up after pre-engagement
- 4. Assumes training related to scope is all done by the State which includes training on the portal and content specific training – gives 5 days for all training including on performance metrics, script training and role play
- 5. Corporate orientation and training is no more than 2 days but likely 1 since the 2 days includes developing a training plan and materials
- 6. Indicates number of days for each task but no dates – for example when is training in relation to Go Live

iii. Timeline

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 365 BOOKSPRO, LLC

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments: This bid contains lots of puffery and little substance.

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. LLC founded in 2015 and is in Oxon Hill, Maryland

ii. Background

1. Government agencies and private sector
2. Not much detail about background – overview of basic skills that would bring to engagement

iii. Project Examples

1. US Department of Transportation (not clear what specific customer service was being provided – looks like staffing service but not call center); Washington Metropolitan Area Transit Authority (customer inquiries, complaints, and service requests – high volume); MyAdvisor360 LLC (accounting firm – implemented financial management software [meaning account management not investment management] – not relevant to this engagement)
2. Nothing that shows experience with this type of call center project; says have public sector clients but not much to show other than the USDOT

b. Subcontractors

Partnering with Global Executive Staffing – provided master agreement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 365 BOOKSPRO, LLC

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

c. Organizational Chart

- i. Provided – All quality assurance, IT, and quality control comes from the corporate office level and does not appear to be dedicated to the project; very lean

Note: titles are sufficient job descriptions not necessary

d. Litigation

- i. Current None
- ii. Past 5 years None

e. Financial Viability

- i. Dun & Bradstreet Snapshot

f. Licensure/Certification

- i. Not applicable

g. Certificate of Insurance

No general liability just professional liability and minimal cyber insurance

2. Proposed Services

a. Services to be provided

- i. Operations
 - 1. System availability 99%
 - 2. Recovery Time Objective

- ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*

- 1. Number of CSAs

- a. Rather than 40 agents with supervisors above, have 2 teams of 20 agents with 1 identified as the Team Lead overseeing the other 19

- 2. Recruitment of Professional and Experienced CSAs

- a. Partnering with Global Executive Staffing – they will do recruiting and training; bidder will focus on technological infrastructure

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 365 BOOKSPRO, LLC

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- b. Not much detail about precise approach
- c. Staffing plan is confusing – note that a bachelor's degree is required for the client service specialist with responsibility for complex customers inquiries; customer team leader may also require a bachelor's degree – they oversee the other agents and resolve escalated issues
- d. Basic agents are expected to “provide basic, non-technical customer support” – not sure the bidder understands the complexity of this engagement

- iii. Process for measuring performance
Not Provided

Note that these metrics will be developed post award as part of the contract negotiations

- iv. Vendor system for managing call queues and quality assurance
Bidder says it will use “cutting-edge call management solutions but doesn't identify the telephony or other systems

Note: 1 public facing phone number that route calls through the vendor's call management system; no interface with the CRM; vendor should indicate call sampling methodology to be used

- v. Training Plan – Not provided

b. Implementation Plan

- i. Project Team – per org chart
- ii. Steps and Tasks
 - 1. 1 to 3 weeks for hiring and training of agents in Month 1; training starts in Month 1 then Go Live and then additional training; very light on details
- iii. Timeline – aggressive approach especially since little detail; question ability to do a rapid deployment and whether they have sufficient experience with this type of engagement

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capitol Bridge, LLC

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. LLC founded in 2012 and located in Arlington, Virginia

ii. Background

1. Federal, state and local government clients
2. Unemployment services Florida, Kansas, DC; no Maine presence
3. Experience quickly setting up new call centers; ramping staffing levels up and down; talent acquisition team; existing pool of qualified candidates

iii. Project Examples

1. Florida Department of Commerce (unemployment insurance services including appeals, benefit determinations; eligibility questions, applications); DC Department of Employment Services (unemployment insurance; claimant FAQ, claim submission look-up, guidance on claims process); Centers for Medicare and Medicaid Services/Workers' Compensation Review Contractor (troubleshoot applications, submissions and proposals; medical and legal review)

b. Subcontractors

i. None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capitol Bridge, LLC

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- c. Organizational Chart
 - i. Provided and appropriate for the project
- d. Litigation
 - i. Current – Contract dispute; employee discrimination claiming retaliation for requesting accommodation due to pregnancy
 - ii. Past 5 years - None
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot no concerns about viability
- f. Licensure/Certification
 - None required for project
- g. Certificate of Insurance
 - Provided

2. Proposed Services

- a. Services to be provided Clear understanding of the service requirements and unique needs of the program
 - i. Operations
 - 1. System availability 99.9%
 - 2. Recovery Time Objective Less than 15 minutes
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. Will meet requirements; experience with rapid ramp up and ramp down
 - b. Hybrid call center approach – remote work-from-home agents and call center in Puerto Rico (note despite what bidder says, Puerto Rico has a very unstable utility/technology infrastructure)
 - c. Question: RFP says agents must be in the United States – does that include US territories?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capitol Bridge, LLC

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Provide equipment at call center but remote provide their own; use Amazon Workspace virtual desktop integration
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Internal recruiting resources – draw from existing pool
 - b. Engage Maine based community organizations and universities, online recruitment targets within Maine
 - c. Use a continuous recruiting process
- iii. Process for measuring performance
 - 1. Monitor random sample of calls each week for each agent; standard metrics for this industry; includes soft skills
 - 2. Record 100% of calls
 - 3. Touchtone customer satisfaction survey at conclusion of the interaction

Note that these metrics will be developed post award as part of the contract negotiations
- iv. Vendor system for managing call queues and quality assurance
 - 1. Amazon Connect: real-time and historical dashboards; scheduling and workforce management
 - 2. Use an integrated voice response system to direct calls and automated call distribution system to route calls based on skills
- v. Training Plan
 - 1. Role play, training, skills testing; coaching and multiple learning modalities to address different learning styles
 - 2. Start with existing internal training on their platform, use of technology, use of Microsoft Teams for training and coaching then train on Department's CRM and specific program
 - 3. Acknowledge need for significant training and knowledgebase development; will need to review and update frequently
 - 4. Acknowledged need to straddle the Christmas holiday
 - 5. All agents will have a period of nesting
 - 6. Phase II training later prior to launch of new parts of the program like private plan substitutions

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capitol Bridge, LLC

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

b. Implementation Plan

- i. Project Team – Company has a project management office; use Project Management Institute and Society for Human Resource Management guidelines and best practices
- ii. Steps and Tasks
 - 1. Pre-contract tasks include starting recruiting process
 - 2. All staff onboarded by 12/13/24; complete program training materials; training complete by 12/27/24
 - 3. Basic steps and timing appropriate for the project including tasks and timelines going forward after launch
- iii. Timeline Go Live 12/20/24
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic, LLC

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments: This bidder is focused more on technology than the technical aspects of the engagement including recruitment, training, and project management details.

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. LLC founded in 2006 and located in Ventura, California

ii. Background

1. Government agency clients – notes projects for Veterans Voice of America and Vietnam Veterans of America as examples of engagements that makes them qualified for the PFML contract
2. Heavy reliance on AI; use of an AI WIKI for agents to get real-time answers to inquiries
3. No Maine contracts or relationships noted; no government contracts detailed or even noted

iii. Project Examples

1. Vietnam Veterans of America (customer service but no substantive detail); Veterans Voice of America (customer service but no substantive detail); Pet Wellness Direct (customer service and sales calls)

b. Subcontractors

Didn't answer this

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic, LLC

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- c. Organizational Chart
 - i. Provided – Looks like they may be hiring quality assurance, recruiting, training, data analyst and operations specialist for PFML project – says to be determined
- d. Litigation
 - i. Current – wage dispute
 - ii. Past 5 years - none
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – ongoing dispute with Dun & Bradstreet that is being resolved so no detailed snapshot available; instead provided general statements about the company’s financial viability – bidder will provide financial statements if requested
- f. Licensure/Certification – None required but if there are any, bidder will obtain them
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability - 99% (based on the bidder’s workforce management resources not redundancies or similar technological backstops)
 - 2. Recovery Time Objective – not answered
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 “augmented” by agent dedicated to responding to written inquiries; team will expand as needed but no information on how they will make that happen

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic, LLC

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- b. Says can scale up and down but no explanation of how other than existing pool that they can pull from and activate in an emergency within 24-48 hours
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Bidder says their recruitment team has experience hiring agents in Maine but nothing to support that
 - b. Will develop partnerships with local staffing agencies; use job fairs; targeted advertising
- iii. Process for measuring performance **Note that the quality assurance specialist will be overseas**
 - 1. Bidder says will have real time reporting; call monitoring with goal of monitoring up to 10% of interactions
 - 2. Customer satisfaction surveys will be used; survey seems to be the tool they rely on most
 - 3. All calls will be recorded; interactive dashboards for monitoring what's in the queue, agent performance, service levels; 2 people will monitor and review calls but no discussion of supervisor or quality assurance team listening to live calls – focus is on analyzing the data with historical review of calls not monitoring interactions
- iv. Vendor system for managing call queues and quality assurance
 - 1. Exact system not identified; functionally will include automatic call distribution; intelligent routing; predictive analytics for forecasting; workforce management system can automatically trigger staff adjustments
- v. Training Plan
 - 1. 5-day onboarding – focused on substantive aspects of the program and the technology, general customer service agent training
 - 2. Simulations, role-playing, live instruction, e-learning and peer-to-peer mentoring – note says e-learning is self-paced
 - 3. AI knowledge base seems to update information by culling responses from agent interactions
 - 4. Ongoing – quarterly refreshers, quality assurance feedback; coaching

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic, LLC

DATE: October 11, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

b. Implementation Plan

i. Project Team – as per organizational chart

ii. Steps and Tasks

1. Recruitment and hiring expected through entire month of December; agent training and onboarding comes before supervisory and quality assurance training; quality assurance tools and protocols will be established the last week of December
2. Limited detail – high level tasks noted
3. AI will play a role in recruiting and training

iii. Timeline – no specific date given just says it is during third and fourth weeks of Month 1

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom Technology Consultants LLC

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience
Bidder submitted multiple files within three separate folders rather than 3 files as instructed
 - a. Overview of Organization
 - i. When formed and location of headquarters
 1. LLC formed 2006 and located in Oscoda, Michigan
 - ii. Background
 1. Federal, State and local government clients
 2. Experience includes registration processes and basic customer service
 - iii. Project Examples
 1. State of Michigan SNAP and WIC programs – subcontractor for FIS (customer service including dispute resolution); FIS Global (technical support); California State Disbursement Unit – maybe a subcontractor for Conduent, Inc. (customer assistance in making child support payments)
 - b. Subcontractors
 - i. MI Call Center – staffing agency owned by bidder
 - ii. Bonney Staffing
 - c. Organizational Chart
 - i. Provided – appropriate for project

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom Technology Consultants LLC

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current - None
 - ii. Past 5 years - None
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – no concerns
- f. Licensure/Certification
 - i. None but provided SOC audit
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – didn't respond
 - 2. Recovery Time Objective – didn't respond
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 20 from Maine and 20 from Michigan
 - b. Remote and in-house
 - c. Custom call flow guide provides decision tree
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Use their own staffing agency in Michigan and Bonney Staffing in Maine
 - iii. Process for measuring performance
 - 1. 100% calls recorded – note recordings are deleted after 45 days
 - 2. Evaluate random recordings
 - 3. Customer surveys every 25th caller – optional
 - 4. Typical industry metrics with real-time reporting generated automatically

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom Technology Consultants LLC

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

Note that these metrics will be developed post award as part of the contract negotiations

- iv. Vendor system for managing call queues and quality assurance
 - 1. RingCentral and Nice CXOne
 - 2. Use interactive voice response and skill-based routing
 - 3. Optional callback features
- v. Training Plan
 - 1. Use a train-the-trainer approach
 - 2. Modules with role-play
 - 3. Pilot test with small group of lead trainers
- b. Implementation Plan
 - i. Project Team – as in org chart
 - ii. Steps and Tasks
 - 1. Includes data migration and system integration – assumptions of bidder may be incorrect
 - 2. Agent deployment and test calls scheduled for 12/31/24
 - iii. Timeline – Go Live 12/29/24
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Data Listing Services, LLC dba The Connection

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. Registered LLC 1997 with headquarters in Bloomington, MN

ii. Background

1. Experience with state and federal government programs including online filing systems for businesses (IRS)
2. Experience with rapid deployment

iii. Project Examples

1. IL Department of Financial and Professional Regulation (contact center for professional licensing); Community and Economic Development Association of Cook County, Inc. (contact center for LIHEAP); IL Department of Commerce and Economic Opportunity (assist consumers with pre-application process for various federal and state funded program including LIHEAP and block grants)
2. Experience with handling difficult customer situations that may be emotionally charged

b. Subcontractors

- i. None

c. Organizational Chart

- i. Provided
- ii. Covers all areas one would expect

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Data Listing Services, LLC dba The Connection

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current - None
 - ii. Past 5 years - None
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – no concerns
- f. Licensure/Certification
 - i. None
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – didn't respond
 - 2. Recovery Time Objective – didn't respond
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 as required with goal to hire 100% Maine residents
 - b. Team supervisor will oversee day-to-day
 - c. Workforce team dedicated to making sure appropriate staffing levels are maintained
 - 2. Recruitment of Professional and Experienced CSAs
 - a. No real discussion of recruitment processes
 - iii. Process for measuring performance
 - 1. Proprietary quality management tool using scorecards with key performance indicators
 - 2. Both recorded and live calling monitoring
 - 3. Remote monitoring access for the Department if desired
 - 4. Monitor 10-15 calls per month per agent

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Data Listing Services, LLC dba The Connection

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- iv. Vendor system for managing call queues and quality assurance
 - 1. Various platforms available
 - 2. Omni-channel platform routes using skills-based routing; automated self-service Interactive Voice Response options available – question if we want this – can also be used for after call surveys
 - 3. Proprietary knowledge base system which includes call scripting, procedures, FAQs specific to PFML; can be updated quickly and is customizable
- v. Training Plan
 - 1. Team of trainers who also develop curriculum
 - 2. Multiple educational approaches including role-playing
 - 3. Regular knowledge assessment
 - 4. Use seasoned agents to mentor newer agents
- b. Implementation Plan
 - i. Project Team
 - 1. To the extent there is a Project Manager, it appears to be the Director of Client Services
 - ii. Steps and Tasks
 - 1. Come on site in Maine as part of implementation
 - 2. Envisions integration with Department CRM
 - 3. Go Live preparation and training kickoff during Week 2
 - 4. Anticipated Go Live date is in Week 3 – very aggressive timeframe for deployment
 - 5. Includes phases after Go Live for any program/process enhancements and strategic review and planning
 - iii. Timeline
 - 1. Assumes Go Live Week 3 of the engagement
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: DiRad Technologies, Inc.

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience
 - a. Overview of Organization
 - i. When formed and location of headquarters
 1. Incorporated in 1984 and located in Clifton Park, New York
 - ii. Background
 1. Call centers for government agencies since 2002; points to work for New York City (motor vehicles, health and elections)
 2. Familiar with confidentiality including HIPAA
 - iii. Project Examples
 1. Memphis Light, Gas & Water (customer services inquiries); Convenient MD (customer service during pandemic); Vanguard Direct, for VERIFINY (call center for 11,000 car dealerships – precise services not clear)
 2. Not much detail provided
 - b. Subcontractors
 - i. None
 - c. Organizational Chart
 - i. Provided
 - ii. Positions appropriate for the project
 - d. Litigation
 - i. Current - None
 - ii. Past 5 years - None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: DiRad Technologies, Inc.

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – Bidder notes the report is inaccurate and incomplete but will provide any other financial information needed if a viable bidder for the contract. Agree that if they are a cash company, the snapshot and scores could be skewed.
 - ii. No liens, no judgments, no lawsuits
- f. Licensure/Certification
Not applicable to this project
- g. Certificate of Insurance
 - i. Provided
- 2. Proposed Services Other than acknowledging the various requirements in the RFP, Bidder provided little by way of specific approaches to meeting those requirements.
 - a. Services to be provided
 - i. Operations
 - 1. System availability – at least 99%
 - 2. Recovery Time Objective – none provided bidder will set it whenever the system goes down
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. Meets requirement
 - b. Equipment will be provided
 - 2. Recruitment of Professional and Experienced CSAs
 - a. No specific information about the recruitment and hiring process other than to say will hire the best quality candidates
 - iii. Process for measuring performance
 - 1. Using Genesys Cloud CX for quality assurance; monitoring and reporting tools; no specifics about what types of tools

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: DiRad Technologies, Inc.

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

and whether will monitor live or recorded calls or how many,
if any, calls will be recorded.

- iv. Vendor system for managing call queues and quality assurance
 - 1. Genesys Cloud CX: omnichannel; AI to assist with quality assurance; forecasting for staff levels; scoring

- v. Training Plan
 - 1. Uses a learning management system; will provide “extensive” training; no specifics about their training approach or philosophies

b. Implementation Plan

- i. Project Team – Based on positions in org chart – seems appropriate for the project
- ii. Steps and Tasks
 - 1. Hiring finishes first week in December with onboarding second week; not clear if have existing pool to draw from
 - 2. Equipment distribution last week of December/first week of January with Go Live first week in January; wonder about ability to ramp up quickly
 - 3. PFML training is second week in January; quality control documentation is developed 2 weeks after Go Live
- iii. Timeline – Go Live first week in January
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: F.H. Cann & Associates, Inc.

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. Corporation founded in 1999 and located in North Andover, Massachusetts
2. Offices in New Hampshire, Massachusetts and Texas

ii. Background

1. Government clients including Massachusetts Department of Unemployment Assistance, Department of Health and Human Services, and Department of Revenue.
2. Also, Illinois, New Jersey, New Hampshire, and federal agencies
3. Some of their engagements require appointment scheduling, program approvals, application and document processing, explanation of benefits and options

iii. Project Examples

1. New Hampshire Department of Public Health and Human Services (customer assistance with benefit applications); Illinois LIHEAP (application assistance, appointment reminders and scheduling); US Department of Education Federal Student Aid Office (call center and collections work); Massachusetts Department of Unemployment Assistance (employment issues during pandemic); Massachusetts Executive Office of Health and Human Services (COVID vaccination call center)
2. Appears able to ramp up quickly

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: F.H. Cann & Associates, Inc.

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- b. Subcontractors
 - None
- c. Organizational Chart
 - i. Provided – positions seem appropriate for the project
- d. Litigation Note that all lawsuits relate to their collections division and not their call center division
 - i. Current – one collections case
 - ii. Past 5 years – multiple collections cases
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot no concerns
- f. Licensure/Certification
 - i. Registered corporation in good standing in Maine
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability 99%
 - 2. Recovery Time Objective
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 35 Tier 1 and 5 Tier 2 agents
 - b. Commits to a workforce that is 75% Mainers
 - c. Experience quickly scaling up; monitor call volumes and staffing needs throughout each day
 - d. Cross-train to allow agents to flex across projects

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: F.H. Cann & Associates, Inc.

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- e. Provides all necessary equipment; remote workers but Maine resident workers could work out of their Exeter, NH office (about 1 ¼ hours from Portland)
 - f. Propose both Tier 1 and Tier 2 CSAs – RFP envisions only Tier 1 with escalation to the Department
 - 2. Recruitment of Professional and Experienced CSAs
 - a. 5 levels of recruiting – go to next level when first one fails: recruiting websites, social media, job fairs and recruiting websites; employee referral bonus possible
 - b. Look for existing CSAs on other projects that can scale staff down and reassign
 - c. Recruit diverse workforce including persons with disabilities, veterans, and minorities
 - d. Use SharePoint to house the knowledgebase, scripts, etc. but bidder says they understand the Department will house and manage the FAQs and knowledgebase
 - e. Use Teams channels to knowledge sharing and call assistance
- iii. Process for measuring performance
 - 1. Automated call scoring using speech analytics; supervisors review 3 calls per agent per month; industry appropriate metrics; record all calls
 - 2. Supervisor monitors calls in real time daily, can provide coaching assistance on live calls
 - 3. Use AI (SpeechIQ) to monitor and analyze calls as well as manual monitoring
 - 4. Compliance and quality assurance is strong

Note that these metrics will be developed post award as part of the contract negotiations
- iv. Vendor system for managing call queues and quality assurance
 - 1. Omni Voice Telephony with own software (Artiva); functionality includes customer satisfaction surveys, automatic call distribution, skills-based routing, with Artiva handling call monitoring and reporting
 - 2. Has internal language translation line called Lionbridge – 350+ languages; also have bi-lingual agents fluent in multiple languages

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: F.H. Cann & Associates, Inc.

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

v. Training Plan

1. Have an internal training department
2. Ascentis used for the learning management system; initial and ongoing training; custom modules will be developed – have an internal training manager
3. Instructor led (initial training always instructor led), e-Learning, simulations, role-playing, mentorships, shadowing; gamification – approach for all learning styles
4. Annual training and mandatory testing

b. Implementation Plan

i. Project Team – appropriate for the project

ii. Steps and Tasks

1. Staffed by 12/6/24 including onboarding
2. Assumes will receive “client specific” training materials by 11/11/24
3. User acceptance testing 12/23 through 12/25
4. 5 days to create internal training materials – created after the train-the-trainer

iii. Timeline Go Live 12/30/24

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Gatestone & Co. International Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. Formed 1978 and located in Phoenix, AZ

ii. Background

1. Experience with walking customers through application processes, inquiries, complaints
2. Government and commercial clients

iii. Project Examples

1. Government of Canada (customer service inquiries for government services); Kohl's (customer support for credit cards and debt collection); Citizens Bank (customer inquiries of all types including fraud intake and collections)

b. Subcontractors

i. None

c. Organizational Chart

i. Provided

ii. Appropriate set of positions for the project

d. Litigation

i. Current - None

ii. Past 5 years - None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Gatestone & Co. International Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – no concern
- f. Licensure/Certification
 - i. Foreign corporation registered in Maine
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – 99%
 - 2. Recovery Time Objective – 30 minutes
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 as required
 - b. All equipment and dedicated office space will be provided – no remote option?
 - c. Will conduct rolling forecasts but no discussion of ability to scale quickly
 - 2. Recruitment of Professional and Experienced CSAs
 - a. No discussion of recruitment
 - iii. Process for measuring performance
 - 1. Quality assurance checks, etc. but no detail on whether monitor live and recorded calls or other tools that will be used

Note that these metrics will be developed post award as part of the contract negotiations

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Gatestone & Co. International Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- iv. Vendor system for managing call queues and quality assurance
 - 1. Didn't identify the system that will be used; assumes integration of their system and Department systems
- v. Training Plan
 - 1. Will provide materials and conduct comprehensive training but no detail beyond that
- b. Implementation Plan
 - i. Project Team – as noted in org chart
 - ii. Steps and Tasks
 - 1. Four phases – project completion within 19 days – seems aggressive
 - 2. Equipment and facility setup within 17 days
 - 3. 10 days for training – no mention of recruitment/onboarding time
 - iii. Timeline – no specific date given for launch
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus US Services, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience –

a. Overview of Organization

i. When formed and location of headquarters

1. Parent company founded in 1975; bidder incorporated in 2007 and located in McLean, VA
2. Project Director is in Augusta, ME

ii. Background

1. Works exclusively in government services including unemployment insurance
2. Engagements with Maine DHHS, Bureau of Insurance, Department of Corrections, DAFS, and Department of Education
3. Experience with government call centers and working with TPAs and employers
4. Experience with rapid deployment and quick ramp up

iii. Project Examples

1. Maine Bureau of Insurance (Independent Review Organization – medical reviews); Maine DHHS Office of the Health Insurance Marketplace (technical assistance, coverage options, appeals processing, for consumers, brokers, and navigators); Massachusetts Department of Public Health (established during pandemic to provide consumer information); Wyoming Department of Family Services, Child Support Program (new hire reporting services – assist employers with compliance; do this for 13 States)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus US Services, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- b. Subcontractors
 - i. None
- c. Organizational Chart
 - i. Provided
 - ii. No HR/Talent Acquisition person
- d. Litigation Given the size of the parent and the number of subsidiaries, the number and type of lawsuits are not surprising
 - i. Current – Included in suit alleging failure to pay overtime and other claims; suit alleging parent and subsidiary improperly charged a State; wrongful termination suits; data breach including due to MOVEit cyber incident.
 - ii. Past 5 years – largely wrongful termination suits
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – provided snapshot for the parent company; no concerns with financial viability of parent
- f. Licensure/Certification
 - i. None necessary
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – 99%
 - 2. Recovery Time Objective – virtually 0 based on redundancies and other safeguards
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. Can work from home or office in Augusta or hybrid

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus US Services, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- b. Required number of agents will be provided
 - c. Presence of Augusta office allows for in person team meetings, trainings, staff connection
 - d. Use staffing forecasting tools – may hire temp staff, reallocate cross-trained staff, provide support from back office
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Focused on being customer centric
 - b. Shared Service Organization that provides pool of available resources to allow rapid deployment
 - c. Also recruit particularly in Maine using staffing agencies and use employee referral program
 - d. Skills include patience and active listening
- iii. Process for measuring performance
 - 1. Call monitoring – 100% call recording and screen capture; live monitoring as well
 - 2. Quality control for work in-progress; quality assurance retrospectively – random sampling and scorecards
 - 3. Quality management system provides immediate notification followed by action and resolution
 - 4. Real-time dashboards
 - 5. Customer satisfaction surveys

Note that these metrics will be developed post award as part of the contract negotiations
- iv. Vendor system for managing call queues and quality assurance
 - 1. Genesys Cloud – some functionality: courtesy callback list; interactive voice response; team collaboration features
 - 2. Can manage scripts; manages scheduling
 - 3. Forecasting tools as well
- v. Training Plan
 - 1. Performance based (skills and program knowledge) and scenario based (mock calls and role play) – includes a nesting period
 - 2. Ongoing – updates and includes coaching if needed to address identified gap

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus US Services, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

3. Provides refresher and remedial training as needed and annual training

b. Implementation Plan

i. Project Team

1. Project Management Institute framework
2. Members from their Program Management Office – certified Project Management Professionals

ii. Steps and Tasks

1. Detailed work plan provided that covers each requirement of the RFP and tasks to support those requirements
2. Includes building a business contingency and continuity plan
3. Test Go Live on Friday with Go Live the following Monday

iii. Timeline

1. Go Live 12/30/24

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: McGhee and Associates LLC

DATE: (Insert date proposal was reviewed by individual evaluator)

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience Negative impression overall
 - a. Overview of Organization
 - i. Form of corporation and location of headquarters
 1. LLC founded in 2013 located in Las Vegas, NV
 - ii. Background
 1. Little information about how long they have been in business. Bidder says, "over a decade of experience."
 2. States they have extensive experience but there is not much to explain the scope of their experience.
 3. Bidder states company focuses on "compliance and specialized knowledge of unique programs like PFML but nothing to indicate they have done a PFML or similar project.
 - iii. Experience and Project Examples
 1. CARES Act Call Center for Sarasota County, FL
 2. COVID Vaccine Registration Call Center, Sarasota County, FL
 3. Waitlist Application Line for Housing Authority of Baltimore City
 - b. Subcontractors *Not addressed*
 - i. [Name, etc.]
 - c. Organizational Chart
 - i. Provided chart
 - ii. Staff roles are not unreasonable

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: McGhee and Associates LLC

DATE: (Insert date proposal was reviewed by individual evaluator)

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation *Not addressed*
- e. Financial Viability *Not addressed*
 - i. Dun & Bradstreet Snapshot
- f. Licensure/Certification *Not addressed*
- g. Certificate of Insurance
 - i. Provided certificate
 - ii. *Accidentally included a certificate of coverage for another client – Negative impression*

2. Proposed Services (*See Part II of the RFP*)

- a. Services to be provided
 - i. Operations
 - 1. System availability –
 - a. 99.9% uptime “guarantee”
 - 2. Recovery Time Objective –
 - a. Under 30 minutes
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. CSAs will have to provide own equipment Question what steps bidder takes to make sure equipment is adequate; internet connectivity is adequate; and security measures including VPNs are in place
 - 2. Will employ “appropriate number of supervisors and support staff”; 8-10 agents per supervisor. Question how much supervisory and support staff needs to be hired to support the program
 - 3. Recruitment –
 - a. In recruiting look for at least 1-2 years customer service or call center experience; remote readiness and excellent communication skills, problem solving ability and technical proficiency.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: McGhee and Associates LLC

DATE: (Insert date proposal was reviewed by individual evaluator)

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- iii. Process for monitoring performance
 - 1. Will monitor and score a portion of calls daily.
 - 2. Look at trend analysis, evaluation forms, and quality scores.
 - 3. Will use call monitoring software to identify areas for improvement and ensure consistency.
 - iv. Vendor system for managing call queues and quality assurance –
 - 1. Dialpad cloud-based communication platform; automatic call distribution; analytics dashboard so can measure performance in the moment
 - 2. Automatic call distribution and skill-based routing
 - 3. No mention of providing a toll-free phone number; assumes interface with CRM
 - v. Training plan
 - 1. Limited description of any tools used or curriculum other than instruction on PFML program, the CRM system, online portal and best practices for customer service
 - 2. Ongoing training – bidder basically says it will happen without much description of the training agents currently receive.
- b. Implementation Plan
- i. Project Team – as per org chart
 - ii. Steps and Tasks
 - 1. Information provided was very general and did not provide details about tasks. For example, Month 2 starts with “initial agent training” but Month 1 has no tasks for the development of that training.
 - iii. Timeline
 - 1. No specific timelines and no date for Go Live. Question the bidder’s belief that all development and training will occur such that can Go Live during the second month after the contract award.

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support
BIDDER NAME: Midtown Personnel, Inc. d/b/a The Midtown Group
DATE: October 9, 2024
EVALUATOR NAME: Judith Shaw
EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- 1. Organization Qualifications and Experience
Generally not impressed with the negative rhetoric the bidder includes in their proposal including calling out failed public sector launches
 - a. Overview of Organization
 - i. When formed and location of headquarters
 - 1. Incorporated in 1989 and located in Washington, DC
 - ii. Background
 - 1. State and Federal government clients
 - 2. Public sector services added in 2001
 - 3. Projects have required to scale up and down depending on peak periods
 - iii. Project Examples
 - 1. US Department of Agriculture (financial assistance application process – 200 agent call center deployed within 6 weeks of contract initiation); DC Health Link Contact Center – subcontractor to Maximus (provided Maximus with staffing services); Southeastern Pennsylvania Transportation Agency (customer information about SEPTA services and transportation scheduling); Federal Emergency Management Agency as subcontractor to General Dynamics (disaster recovery and assistance – rapid deployment)
 - b. Subcontractors
 - i. CloudHesive (startup tech company) premier partner of Amazon Web Services.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Midtown Personnel, Inc. d/b/a The Midtown Group

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- c. Organizational Chart
 - i. Provided
 - ii. Supervisors on call center team appear to be assigned curriculum development and training
- d. Litigation
 - i. Current - None
 - ii. Past 5 years - None
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – Provided
 - ii. Also provided company financials - no concern with financial viability
 - iii. 3 open tax liens disclosed
 - iv. Not appropriate to express such a strong negative opinion about Dun & Bradstreet
- f. Licensure/Certification
 - i. National Women's Business Enterprise Certification
 - ii. Otherwise focused on Amazon Web Service's certifications
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – 99.9% uptime (based on use of Amazon Web Services)
 - 2. Recovery Time Objective – not provided
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. Will meet requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Midtown Personnel, Inc. d/b/a The Midtown Group

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- b. Each shift starts with a briefing on program updates and FAQs
 - c. Forecasting using CloudHesive's AWS reporting capabilities
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Draws from large pool of pre-qualified agents
 - b. Current project ending in December so may draw from those agents
- iii. Process for measuring performance
 - 1. Basic process for tracking metrics and providing feedback – no detail provided

Note that these metrics will be developed post award as part of the contract negotiations
- iv. Vendor system for managing call queues and quality assurance
 - 1. Amazon Connect – functionality includes AI services that can provide transcription and trend analysis; also use Amazon AI for agents to get coaching and suggestions on how to answer a question
 - 2. ConnectPath part of Amazon Connect hosted on CloudHesive – provides dashboard functionality; routing; callback queues
 - 3. Very heavy reliance on AI
- v. Training Plan
 - 1. After training on the PFML portal, will finalize agent training and development plan and provide it but bidder says it will provide 2 days of call center training before PFML portal training with 1 additional day of general training after
 - 2. Mock calls, simulations
 - 3. Ongoing training – existing training methodology but no detail given

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Midtown Personnel, Inc. d/b/a The Midtown Group

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

b. Implementation Plan

- i. Project Team – as set forth in org chart
- ii. Steps and Tasks
 - 1. Detailed plan provided
 - 2. Says testing environment is finished in January
 - 3. Considers integration with PFML Portal
- iii. Timeline – assumes launch in January
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. Incorporated in 1996 and located in San Jose, CA

ii. Background

1. International presence
2. IT company at its core – helpdesk services big part of their projects
3. Dedicated public sector unit established in 2013
4. Public sector clients mostly in New York

iii. Project Examples

1. New York City Department of Education (helpdesk support); same department – Office of Pupil Transportation (helpdesk and information updates); Lufthansa (helpdesk support)
2. Examples do not focus on business operations and application processes

b. Subcontractors

- i. Affiliate – Nagarro GS, Inc. located in New York – note that later in proposal they say they have not engaged any subcontractors

c. Organizational Chart

- i. Provided
- ii. Covers basic roles one would expect except for HR/Talent Acquisition

Note: titles are sufficient job descriptions not necessary

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current - None
 - ii. Past 5 years – Not answered
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – few outstanding liens from States but none that would raise a question about financial viability
- f. Licensure/Certification
 - i. Registered in Maine a foreign business corporation
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – 99%
 - 2. Recovery Time Objective – not addressed
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 as required with a 1:10 ratio supervisors to agents
 - b. Client interaction logged in PFML Portal – use a helpdesk ticket type system
 - c. Maine (primary) and New York City – can backstop each other if needed in a disaster recovery scenario; anticipate providing office space and other facilities – percentage of remote work?
 - d. Equipment including headsets and phones provided
 - e. Ramp up or ramp down of staffing based on call volume, average handle time, time to respond, and abandoned rate in conjunction with forecasting
 - f. No cross-training – dedicated to this project

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

2. Recruitment of Professional and Experienced CSAs
 - a. No discussion of recruitment process
 - b. Seem to rely on existing pool of 150 agents including a public sector pool
 - c. Note that they use production contests as an incentive for performance
- iii. Process for measuring performance
 1. Typical data analytics
 2. Online active dashboards for real-time monitoring including by agents
 3. Daily reviews of random set of live and recorded calls
 4. Customer surveys will be used – sent by email or text
 5. Reliance on AI to listen for words and phrases that might create an alert for further investigation

Note that these metrics will be developed post award as part of the contract negotiations
- iv. Vendor system for managing call queues and quality assurance
 1. Nice VCC call management system – little discussion of scope of functionality
- v. Training Plan
 1. Dedicated training manager
 2. Soft skills, technical triage, business tools
 3. Develop “learning material” in conjunction with Department
 4. Talk about improving what is now happening – seems to assume there is an existing program
 5. Not all agents have to take annual training – depends on performance in certain areas
 6. Will create a knowledgebase including scripts

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

b. Implementation Plan

i. Project Team – as per org chart

ii. Steps and Tasks

1. Setup 2 weeks; 4 weeks of training for agents; 8 weeks to establish operations
2. Table has the setup, training, and establishment of operations all occurring in Month 1
3. No discussion of recruitment

iii. Timeline – no specific launch date noted

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient BPO

DATE: October 7, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organizational Qualifications and Experience

a. Overview of Organization

i. Form of corporation and location of headquarters

1. LLC – wholly owned subsidiary of Navient Corp. located in Herndon, VA

ii. Background

1. Navient B.P.O. formed specifically to specialize in government services
2. Used to rapid deployment
3. Similar project in New Jersey; Colorado PFML
4. 4 million calls handled quarterly in all call centers

iii. Project Examples

1. NY DOL; NJ Temporary Disability Insurance program and NJ Unemployment Insurance Benefit Division; US Bureau of Labor Standards; Indiana Unemployment Insurance during COVID

b. Subcontractors – None will be used

c. Organizational Chart

i. Provided

- ii. Includes Training Department among other expected functions (IT, Quality Assurance, HR, Operations and Project Management)

d. Litigation

- i. Current – None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient BPO

DATE: October 7, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- ii. Past 5 years – 1 employee case
 - e. Financial Viability
 - i. Dun & Bradstreet Snapshot – debt to net worth ratio is high but no apparent ongoing concerns
 - f. Licensure/Certification – no specific licensure or certification required
 - g. Certificate of Insurance
 - i. Provided
2. Proposed Services (*See Part II of the RFP*)
- a. Services to be provided
 - i. Operations
 - 1. System availability – 99%+
 - 2. Recovery Time Objective – none noted
 - ii. Customer Service Agents (CSAs)
 - 1. Number of CSAs
 - a. CSAs cross trained so can reassign agents to meet increased workloads and reductions in workloads.
 - b. 15-20 CSAs per supervisor.
 - c. Staffing reassessed if unable to meet average caller wait time; abandoned call rate; average handle time.
 - 2. Recruitment of Professional and Experienced CSAs –
 - a. Hiring qualifications are appropriate
 - b. After onboarded, emphasis on communication through mentoring and coaching; announcement board for hot topics or changes to the program updated daily
 - iii. Process for measuring performance
 - 1. Uses a Compliance Management System – key component is “Compliance Call Monitoring”: randomly captures calls both live and recorded.
 - 2. Can provide analytics including monitoring scores, evaluation forms, and trends analysis as well as deploying

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient BPO

DATE: October 7, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

any monitoring logs or scoring sheets required by the Department.

- iv. Vendor system for managing call queues and quality assurance
 1. Proprietary system: NaviConnects; bidder will also provide the toll-free number.
 2. Scripting and call flows for escalation will be developed with the Department
 3. Bidder will provide all necessary computer and phone equipment for CSAs. **Note** bidder sometimes permits the use of personal devices but only if client authorizes.
 - v. Training Plan
 1. New hire classroom and simulation training; refresher coursework for tenured staff. Will train on Department specific processes.
 2. If gaps in knowledge/skills identified, use mentoring and coaching – additional training when gap is across multiple agents.
 3. Annual training is focused on compliance requirements.
 4. Procedures and scripts reviewed every two years – updated and training updated as needed. *Two years seems long given potential for law or rule changes*
- b. Implementation Plan
- i. Project Team
 1. Project Director – currently manages 2 contracts with NJ and 1 with DC *Question ability to take on a fast-tracked project with 3 other projects already*
 2. Remainder of team appropriate
 - ii. Steps and Tasks
 1. Approach – formal work breakdown structure following principles of Project Management Institute.
 2. Rapid implementation methodology quickly documents business rules, configures systems, technology, and training. Leverage materials and applications from similar

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

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EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

engagements and use existing library of training content and tools. *Existence of existing library of training content positive.*

iii. Timeline

1. Go-live date of 1/1/25.
2. Project plan assumes tentative contract award fourth week in October with kick off of the project week 1 November.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: PATLive

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. LLC – founded in 1987 and located in Tallahassee, Florida

ii. Background

1. Originally just voicemail and interactive voice response now call center services
2. Core of business is live answering services; services provided to government agencies; clients seem largely located in Florida

iii. Project Examples

1. Florida Division of Corporations (assist with business filings); Florida Department of Health (multiple low volume projects); Florida Housing Finance Corporation (assist distressed homeowners apply for assistance – need to scale up and down as needed)

b. Subcontractors

- i. None

c. Organizational Chart

- i. Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: PATLive

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current - None
 - ii. Past 5 years – two cases that were settled involving wrongful termination. One also alleged denial of FMLA
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – financials not available so can't assess
- f. Licensure/Certification - None needed
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – 99%
 - 2. Recovery Time Objective – 30 minutes
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. Staffing as required and needed
 - b. All equipment provided by bidder
 - c. Will log interactions in PFML CRM
 - d. Can adjust staffing which bidder says will be expedited and “accomplished as quickly as commercially reasonable”
 - 2. Recruitment of Professional and Experienced CSAs – this was not explained
 - iii. Process for measuring performance
 - 1. Monitor live and recorded calls and video capture computer monitor; 100% of calls are recorded

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: PATLive

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

2. Workforce Manager for metrics and key performance indicators

Note that these metrics will be developed post award as part of the contract negotiations

- iv. Vendor system for managing call queues and quality assurance
 1. Genysys Cloud System – includes skill-based routing, real-time call monitoring, call recording, analytics
 2. If requested, will create a knowledgebase available to agents 24/7 encompassing program specific information
- v. Training Plan
 1. Initial training minimum of 40 hours: customer service skills, PFML program, use of PFML portal
 2. Ongoing training as changes to program
 3. Use a learning management system

b. Implementation Plan

- i. Project Team – as per org chart
- ii. Steps and Tasks
 1. Plan on identifying account manager and key personnel after contract awarded
 2. Agent hiring and staffing expected to take a month
 3. Not sure this bidder is familiar with or able to do a rapid deployment
- iii. Timeline – assumes a Go Live date in January
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. LLC formed in 1986 located in Boston, MA
2. Subsidiary of Public Consulting Group Holdings, Inc.

ii. Background

1. Focuses on public sector particularly health, education and human services
2. Experience with call centers with state government including Maine

iii. Project Examples

1. Maine Office for Family Independence (customer service MaineCare applications and eligibility); Alaska Department of Health, Division of Public Assistance (similar to Maine project); Montana Department of Public Health and Human Services (Medicaid, Children's Health Insurance Program)
2. These projects seem like they would translate well to PFML

b. Subcontractors

- i. None

c. Organizational Chart

- i. Provided
- ii. Good balance of positions for this project

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current - None
 - ii. Past 5 years – mostly suits for denial of state benefits that bidder was added to along with State players. Those that have been resolved have all been dismissed.
 - e. Financial Viability
 - i. Dun & Bradstreet Snapshot – no concerns
 - f. Licensure/Certification
 - i. Engagement manager is certified Project Management Professional; Project Director (Darnyelle Cmil) is certified Project Management Professional, Society for Human Resource Management Certified Professional
 - g. Certificate of Insurance
 - i. Provided
2. Proposed Services
- a. Services to be provided
 - i. Operations
 - 1. System availability – commit to meeting 99% requirement
 - 2. Recovery Time Objective – 5 minutes
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. Existing pool that can draw from to immediately provide 40; ratio of 13 agents to 1 supervisor
 - b. Bidder solely serves public agencies; familiar with using state systems and their system at the same time

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- c. Agents use their own technology Question if they have used this approach for the other Maine contracts; if so, any issues with internet connectivity
- 2. Recruitment of Professional and Experienced CSAs
 - a. Through wholly owned affiliate, Staffing Solutions Organization, LLC
 - b. Database of pre-screened and pre-qualified candidates so can deploy quickly, also database of former employees and applicants
 - c. Continuously recruit so always have a pool
- iii. Process for measuring performance
 - 1. Customer satisfaction surveys; manual random spot checks of client interaction data; live monitoring of calls
 - 2. Regular reporting to client including daily and weekly calls
 - 3. Understands the unique needs of a public facing government department
 - 4. Industry type key performance indicators will be used including abandonment rate which is important
 - 5. Takes full advantage of available technology to provide near real time feedback for the Department including web-enabled dashboards
- iv. Vendor system for managing call queues and quality assurance
 - 1. Leverage same telephony platform use for other state-wide call centers (AWS Connect)
 - 2. Provides interactive voice response; call recording; real-time monitoring
 - 3. Additional tools include workflow forecasting and planning for capacity needs
- v. Training Plan
 - 1. Robust training includes multiple learning models and use of a learning management system; simulation; peer learning
 - 2. Assign mentors to each agent
 - 3. Experienced in developing this type of curriculum
 - 4. Separate training for new hires

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

b. Implementation Plan

- i. Project Team includes 2 people with project management certifications
- ii. Steps and Tasks
 - 1. Well thought out; all aspects of project detailed including developing quality assurance metrics with department and tasks after Go Live including regular reporting to department
- iii. Timeline – begin operations 12/30/24; Go Live readiness training week prior
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: SaviLinx

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. LLC formed in 2013 located in Brunswick, Maine

ii. Background

1. Focuses on government agencies; strong Maine presence with multiple engagements with Maine government agencies including DOL unemployment insurance bureau; currently providing services for the PFML program in Massachusetts

iii. Project Examples

1. Massachusetts PFML Program (call center, adjudication, document processing services beginning with employers); Maine Bureau of Unemployment Compensation (support for unemployment claims during pandemic – rapid deployment needed); Maine CDC (COVID hotline – scheduling and answering questions); Efficiency Maine (customer support and claims management)

b. Subcontractors No response

- i. None

c. Organizational Chart

- i. Provided – covers all areas well

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: SaviLinx

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current – None
 - ii. Past 5 years - None
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – Provided; no concerns
- f. Licensure/Certification will obtain anything that is required
 - i. HIPAA/PII/PCI/FTI Compliant
 - ii. HUBZone Certified
 - iii. Woman-Owned WBE
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

Able to draw on best practices, SOPs and knowledgebase from work with Massachusetts PFML program; developed partnerships and network of subject matter experts through the Massachusetts engagement

- a. Services to be provided
 - i. Operations
 - 1. System availability – not addressed
 - 2. Recovery Time Objective – not addressed
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. Will have a temporary team of supplemental agents in the beginning
 - b. 1 supervisor to 20 agents
 - c. Remote “within one hour of a SaviLinx contact center”
 - d. 20 agents in Maine and 20 at their Mississippi location
 - e. Ability to scale up depends on “CSR availability and recruiting requirements”; draw from pool but asks for at least 6 weeks’ notice to scale up

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: SaviLinx

DATE: October 10, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- f. Bidder provides all equipment
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Not really addressed
- iii. Process for measuring performance
 - 1. Monitor average of 8 calls per agent per month; coaching; score card feedback
 - 2. Customer satisfaction survey; metrics typical for this industry
 - 3. Custom dashboard provides “near” real-time reporting
 - 4. Add additional quality assurance staff if agents grow beyond the initial 40
- iv. Vendor system for managing call queues and quality assurance
 - 1. Five9: standard industry telephony solution; omnichannel
- v. Training Plan
 - 1. Agents pick up equipment 12/16; orientation 12/17; Department training next 3 days; remaining training 12/26-27 with Go Live 12/30
 - 2. Bidder’s trainers will also participate in the Department training
 - 3. Regular cadence of refresher courses
- b. Implementation Plan
 - i. Project Team as per organizational chart
 - ii. Steps and Tasks
 - 1. Recruitment/hiring process about a month – starts before contract signed
 - 2. Training seems tight
 - 3. Given need for rapid deployment – plan is not unreasonable
 - iii. Timeline Go live 12/30/24 as required
Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: ShyftOff Corp.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. Incorporated 2020 and located in Tampa, Florida

ii. Background

1. Didn't provide much history or background for the company; focused on their agent performance and scaling approaches
2. No indication of government clients; some nonprofit clients

iii. Project Examples

1. Citizens Insurance of Florida (claim support); Hello Heart (customer assistance with application); National Rural Telecommunications Cooperative (tech support)
2. None are close to our project

b. Subcontractors

i. None

c. Organizational Chart

i. Provided

- ii. Note the Fractional CTO – doesn't appear to be temporary so wonder if he is part-time; also not sure we need a software engineer for this project

d. Litigation

i. Current - None

- ii. Past 5 years - None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: ShyftOff Corp.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – chose not to purchase it but will if seriously being considered for the contract
- f. Licensure/Certification
 - i. None required
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – not addressed
 - 2. Recovery Time Objective – not addressed
 - a. Seems they defer to their vendors
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 as required
 - b. Agents performing best have priority for shifts
 - c. Uses a gig model so independent contractors not employees – asserts this is more flexible; maintains a large pool
 - d. Agents “full autonomy” over when and how much they work
 - e. Agents provide own technology
 - f. Cloud-based phone technology
 - 2. Recruitment of Professional and Experienced CSAs
 - a. No discussion of the recruitment process

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: ShyftOff Corp.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

iii. Process for measuring performance

1. Not much substance provided – weekly reviews and check-ins; analyzes performance data using typical industry key performance indicators
2. No discussion of whether call monitoring and if recorded and/or live

Note that these metrics will be developed post award as part of the contract negotiations

iv. Vendor system for managing call queues and quality assurance

1. Zendesk – no discussion of how it would manage call queues and quality assurance; data reporting; scheduling

v. Training Plan

1. Use Slack for instant updates
2. Not much more about training

b. Implementation Plan

i. Project Team – as set forth in org chart

ii. Steps and Tasks

1. No discussion of recruitment – using existing pool?
2. Not much time for curriculum development
3. Assume integration of their technology with State system
4. Escalation management is up through the bidder's channel and doesn't include the Department

iii. Timeline – no confirmation of a specific Go Live date

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Solix, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. Incorporated 2000 located in Parsippany, NJ

ii. Background

1. Contact center is in Texas; subsidiary, Sivic Solutions Group, is in New York and provides services to some government entities
2. Both public sector and commercial clients

iii. Project Examples

1. Blue Cross Blue Shield of Alabama (customer service); Morris County New Jersey (assist small businesses apply for grants – fairly analogous to PFML); Direct Care Innovations, Inc. (helpdesk for 3 states)

b. Subcontractors

- i. None

c. Organizational Chart

- i. Provided – team seems appropriate

d. Litigation

- i. Current – contract disputes
- ii. Past 5 years – None listed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Solix, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – no concerns
- f. Licensure/Certification – None required
- g. Certificate of Insurance
 - i. Provided

2. Proposed Services

- a. Services to be provided
 - i. Operations
 - 1. System availability – at least 99%
 - 2. Recovery Time Objective – not provided
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 as required
 - b. Monitor call queues so can quickly increase or decrease as needed
 - c. Uses “stack ranking” which measures employees against one another
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Notes recruiting team is “ingrained” in the local market – wonder what their experience with Maine is
 - b. Will use staffing agencies
 - c. Pre-screening; telephone assessment; skills testing
 - iii. Process for measuring performance
 - 1. Monitor calls and processes, give feedback and hold calibration sessions; focus soft skills as well as procedural accuracy
 - 2. Targeted training and coaching as needed
 - 3. Recommends 2 calls per week with Department in the beginning

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Solix, Inc.

DATE: October 9, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- iv. Vendor system for managing call queues and quality assurance
 - 1. NICE inContact Central web-based; omni-channel; functionality includes scheduling, interactive voice technology; customer surveys
- v. Training Plan
 - 1. Experience with adult learner methodologies; client centric model so training meets program needs
 - 2. Initial training instructor-led classes and webinars; uses a learning management system
 - 3. Mock calls, role play and peer-to-peer support
- b. Implementation Plan
 - i. Project Team
 - 1. Primary point of contact – bidder's client relations manager; not much discussion of other team members and where they fit on the implementation plan
 - ii. Steps and Tasks
 - 1. Onboarding expected week 1 of November but don't see that they have existing pool to draw from
 - 2. Developing training after train-the-trainer seems backwards
 - iii. Timeline - Go Live 12/30/24
 - Note launch date for calls is 12/30/24*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Triple Impact Connections, Inc.

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Note that bidder submitted multiple files within zipped folders. Instructions were to submit one file for each category. Overall – does not appear to meet the requirements of the RFP

1. Organization Qualifications and Experience

a. Overview of Organization

i. When formed and location of headquarters

1. Incorporated 2018; primary headquarters Killeen, TX; office in Gorham, ME with 4 management and executive level employees residing in Maine

ii. Background

1. Executive team over 80 years of business processing operations, contact center, and consumer packaged goods experience
2. Lacks detail about experience; doesn't have much government experience or handling of programs similar to PFML

iii. Project Examples

These examples do not match the type of inquiries and assistance required for the PFML program.

1. Pentagon Federal Credit Union (basic customer service); Kipany (hired to provide services to a Kipany client perhaps as a subcontractor; basic customer service); Qdoba Mexican Eats (online ordering)

b. Subcontractors - No answer to question

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Triple Impact Connections, Inc.

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- c. Organizational Chart
 - i. Provided
 - ii. Team seems appropriate for the project
- d. Litigation Not addressed
 - i. Current
 - ii. Past 5 years
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot
 - 1. Snapshot raises some concerns about debt obligations
- f. Licensure/Certification Not addressed
- g. Certificate of Insurance
 - i. Provided
- 2. Proposed Services (*See Part II of the RFP*) Negative impression overall based on comments below
 - a. Services to be provided
 - i. Operations
 - 1. System availability
 - a. 100% - no downtime anticipated Question if this is realistic
 - 2. Recovery Time Objective
 - a. Determined at the time of disruption No objective in mind
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs
 - a. 40 CSAs with 2 Quality Assurance Team Leads and 1 Program Manager
 - b. Also note that onboards agents in waves – question if they can onboard 40 agents all at once.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Triple Impact Connections, Inc.

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

2. Recruitment of Professional and Experienced CSAs
 - a. Little detail provided; looking for customer service experience and appropriate temperament
- iii. Process for measuring performance
 1. Daily metrics reporting includes calls offered, handled, abandoned, % abandoned, average speed of answer, average call handle time, call outcome codes.
 2. Unclear the process – how often are calls monitored; are both live and recorded calls monitored?
- iv. Vendor system for managing call queues and quality assurance
 1. NICE/CX-One cloud-based telephony solution; omni-channel (phone, chat, email); receive inbound calls from the “PFML’s designated phone number”
 2. Plan to use an interactive voice response system; develop voice prompts with PFML
- v. Proposed development of trainings
 1. Quality Assurance Team Leads and Program Manager work with PFML team to develop call scripting, job aids, and call escalation business rules; schedule and facilitate initial training
 2. Going forward, will facilitate on-going refresher training and new hire training as needed. Note that there is no dedicated trainer or training manager
 3. Conclusion of new hire training, testing and certification process to confirm agent can demonstrate necessary skills
- b. Implementation Plan Not addressed

Note: Microsoft Project Plan is an acceptable work plan displayed in a time chart

 - i. Project Team
 - ii. Steps and Tasks
 - iii. Timeline

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Velocitii Contact Center Services LLC

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

1. Organization Qualifications and Experience
 - a. Overview of Organization
 - i. When formed and location of headquarters
 1. LLC formed in 2014 with headquarters in Medina, NY
 - ii. Background
 1. CEO and CIO experience in call centers, business processing operations, customer service
 2. Bidder seems to have health insurance clients which may be useful but no indication of government enterprises
 3. Seems to have experience in rapid deployment and managing shifting staffing needs
 - iii. Project Examples
 1. Casella Waste Management (customer service); Wellabe (health coverage calls including claims status for policyholder, providers, and insurance agents); Hagerty (claims handling and other customer service)
 - b. Subcontractors
 - i. None used
 - c. Organizational Chart
 - i. Provided
 - ii. Team seems appropriate for this project

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Velocitii Contact Center Services LLC

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current - None
 - ii. Past 5 years – Did not answer
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot
 - 1. Provided a summary. Given the limited amount of financial information available to Dun & Bradstreet, no rating is provided.
- f. Licensure/Certification
 - i. None required
- g. Certificate of Insurance
 - i. Provided
- 2. Proposed Services (*See Part II of the RFP*)

Overall negative impression – a number of items were not addressed; unclear what the existing infrastructure is and how it would be leveraged; specific meetings and reports to the client were not addressed

 - a. Services to be provided
 - i. Operations
 - 1. System availability Not addressed
 - 2. Recovery Time Objective Not addressed
 - ii. Customer Service Agents (CSAs) *Note that all CSAs must be in the United States*
 - 1. Number of CSAs Not addressed presumably bidder will meet the State's requirements
 - a. Note that implementation plan includes steps for seating locations and workstation setup. Do they intend to have a physical call center in Maine or elsewhere?
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Anticipate recruiting and hiring first 3 weeks of December

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Velocitii Contact Center Services LLC

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- iii. Process for measuring performance
 - 1. Monitoring tapers off so agent with 91+ days of tenure has 2 interactions per week. Frequency will be adjusted for any agent performing below standard.
 - 2. Calibration sessions between Operations and Quality Assurance are held biweekly.
 - 3. Some KPIs used include average handling time; service level; schedule adherence; abandoned; first call resolution
 - 4. Monthly one on one with supervisor covering performance and KPIs
 - iv. Vendor system for managing call queues and quality assurance
 - 1. Bidder says technology is responsibility of the managed service provider along with network service provider. Question whether uptime and recovery time are delegated to the managed service provider and network service provider. What levels are required in those contracts?
 - 2. Depending on requirements of client, can use a contact center system like Five9 to track statistics. Five9 also can do customer surveys. A contact center system would seem to be important and wonder why it isn't a given.
 - v. Training Plan
 - 1. Solid plan covering planning phase including development of systems; launch and post launch
 - 2. Uses gamification and role playing
- b. Implementation Plan
- i. Project Team
 - 1. No identified Project Manager
 - 2. Team includes Director of Operations, CEO, Recruiter, "IT," Director of Training, and Supervisors
 - ii. Steps and Tasks
 - 1. Bidder assumes client has current training materials despite this being a new program with no customer service history
 - 2. Team training set for last week in December
 - 3. Doesn't appear to be existing infrastructure/knowledge base that is being leveraged

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Velocitii Contact Center Services LLC

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

iii. Timeline

1. Launch January 1, 2025
2. Anticipate recruiting/hiring first 3 weeks of December
3. IT/Supervisor set up reporting first 3 weeks of December
4. Question whether bidder has experience in and is prepared for rapid deployment

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

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Individual Evaluator Comments:

1. Organization Qualifications and Experience

a. Overview of Organization

i. Form of corporation and location of headquarters

1. LLC formed in 1996 and located in Dallas, TX

ii. Background

1. 100,000+ CSAs in the US and Canada
2. Clients include Southwest Airlines, Toyota Connected, Boscov's, Medline, and Intuit TurboTax
3. Some federal government experience specific to employee benefit programs

iii. Project Examples

1. Examples show an ability to increase and decrease staff quickly based on demand
2. Intuit Turbo Tax (application support); FedPoint (assist employees enrolling, renewing and understanding health plan); Toyota Connected (customer service and application support)

b. Subcontractors

- i. None identified

c. Organizational Chart

- i. Provided
- ii. Team appropriate for this project - note VP of Education and Development

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- d. Litigation
 - i. Current - None
 - ii. Past 5 years - None
- e. Financial Viability
 - i. Dun & Bradstreet Snapshot – provided their Dun & Bradstreet number but did not provide the snapshot
 - ii. Private company so want to maintain the confidentiality of financial records but willing to provide more information if awarded the contract
- f. Licensure/Certification
 - i. No specific licensure or certification required
- g. Certificate of Insurance
 - i. Provided
- 2. Proposed Services (*See Part II of the RFP*)

Strength in recruitment, training and system used for program and quality assurance. Lack of information on system availability, recovery time, and implementation plan.

 - a. Services to be provided
 - i. Operations
 - 1. System availability Not addressed
 - 2. Recovery Time Objective Not addressed
 - ii. Customer Service Agents (CSAs)
 - 1. Number of CSAs
 - a. 40 CSAs to start; 1 to 15 ratio supervisors to CSAs
 - b. Ability to manage staffing in real time to adjust service levels throughout the day if necessary
 - c. Significant focus on maintaining adequate staffing levels
 - 2. Recruitment of Professional and Experienced CSAs
 - a. Uses AI-based proprietary talent platform developed specifically for remote work companies then screen candidates using customized tool to find “best talent for the program”

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

- b. Once hired, agents attend a “curated professional education process delivered by our own college-degreed educators in a virtual classroom”
- iii. Process for measuring performance
 - 1. Quality Assurance team monitors a specific number of calls per agent per month
 - 2. Basic key performance indicators used include average handling time, average speed to answer, first call resolution, customer surveys and call scorecarding which will be developed with the client
 - 3. Agents have access to their own quality assurance scores on a Salesforce based agency community platform (Vyne) so they can assess and improve their own performance
Interesting
- iv. Vendor system for managing call queues and quality assurance
 - 1. Bright Pattern: Cloud based omnichannel contact center application; includes disaster recovery, redundancy and failover
 - 2. Appears to be a robust system that could be deployed quickly
- v. Proposed development of trainings
 - 1. Positive impression overall – creative, comprehensive approach that takes all learning styles into consideration
 - 2. Interesting focus on matching the culture and brand of the program
 - 3. Ongoing process: educated on the program; test and role-playing session; if agents pass, use strategic applied learning techniques (SALT) to reinforce what they learned while engaged in live customer interactions.
 - 4. New processes, programs, and information will be delivered through Vyne or through the learning management system (Canvas)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: October 8, 2024

EVALUATOR NAME: Judith Shaw

EVALUATOR DEPARTMENT: Department of Labor

b. Implementation Plan

i. Project Team - as per org chart

ii. Steps and Tasks

1. Bidder provided a sample implementation plan but did not try to map it out to reflect the launch date set forth in the RFP.
2. Generally, the sample shows a 3-month implementation timeline with some steps appearing to be somewhat aggressive. For example, two weeks for contract negotiations and signature.

iii. Timeline

1. No specific timeline other than sample which shows a 3-month implementation timeline.

Note launch date for calls is 12/30/24

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 22nd Century Technology

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Founded 1997.*
- *Large national organization.*
- *6000+ staff with public service focus – contracts across U.S.*
- *Based in West Virginia but has remote staff for local call centers.*
- *N- many contracts with different parts of government noted, but apparently no PFML experience, and no current State of Maine Government experience.*
- *References listed – Illinois Secretary of State, Cincinnati Housing Authority, Michigan Road Maintenance.*
 - 1. *N- none of these directly comparable, other than being state agencies.*

2. Subcontractors

- *None.*

3. Organizational Chart

- *Org chart and project team provided.*

4. Litigation

- *P – none listed.*

5. Financial Viability

- *D&B provided.*

6. Licensure/Certification

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 22nd Century Technology

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *Maine annual filing report provided.*

7. Certificate of Insurance

- *Provided.*

II. Proposed Services

1. Services to be Provided

- *Offers services across the US so can help provide coverage across time zones with business hours.*
- *Notes office in Portland, Maine.*
- *Robust work from home infrastructure. HIPAA and FedRamp complaint.*
- *Call management system is CxConnect – AWS cloud based system.*
- *Can scale up or down based on forecasting.*
- *Recruitment strategy noted page 4.*
- *Q - Notes they have 2,000 resumes for Maine based agents, but unclear if these are current staff or need to hire from 0?*
- *Training plan start page 5 – initial training, on-going training,*
- *QA plan page 6 – side by side monitoring, remote monitoring, self assessment, “agent calibration”, Mentorship.*
- *Live call monitoring and recorded call monitoring.*
- *CxConnect system has robust monitoring and reporting abilities.*
- *N – whole section jargon heavy, impersonal, and generally unclear. Gives concerns about collaboration with the department on short timeframes.*

2. Implementation – Work Plan

- *Project plan page 10*
- *N – does appear they are hiring Maine staff from 0 agents, and propose hiring in 5-7 days, which does not appear realistic.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 365 BooksPro

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Founded 2019, based in Maryland.*
- *Project references are US Dept of Transportation, Washington Metropolis Transit, and MyAdvisor360 financial reporting.*
 - 1. *N – couple government contracts, but none directly comparable.*
- *N – not a lot of detail given about company history or qualifications which creates concerns for this section.*
- *N – no apparent PFML experience noted.*
- *N – no State of Maine experience noted.*
- *N – unclear what contracts/experience the company has besides the 3 references given, which is concerning.*
- *N – concerning lack of detail, content, and coherence in the proposal making it next to impossible to make notes on.*

2. Subcontractors

- *No subcontractors. But is GES a subcontractor?*

3. Organizational Chart

- *Top level org chart provided.*

4. Litigation

- *P- none current or in past 5 years.*

5. Financial Viability

- *D&B provided.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: 365 BooksPro

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

6. *Licensure/Certification*

- *Notes HIPAA and PII compliance.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Proposal services note 5 service areas in the abstract (scalable and responsive operations, skilled and empathetic agents, advanced technology integration, quality assurance and continuous improvement, and data-driven transparency) and then provide almost no addition details.*
- *N- concerning lack of details or content detailing any type of coherent plan to respond to the business need identified in the RFP.*
- *N – did not directly respond to most of the RFP scope of work.*
- *Notes they “will implement technology” – is there a system?*
- *Notes some responsibilities of certain staff roles.*
- *N- no notes on training.*
- *N- no notes on how to manage quality.*
- *N- no notes on detailed recruitment.*

2. *Implementation – Work Plan*

- *Work plan on page 5.*
- *N – extremely concerning lack of a realistic implementation plan.*
- *N – extremely concerning timelines given the notes of milestones. For example – “implement and test call management system” – is there a system that is used? Are they developing a new system?*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capitol Bridge LLC

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 500+ employees, based in VA.
- P- notes several State Department of Labor clients in the past, including Florida, Kansas, and Washington DC UI programs during COVID backlogs.
- References are – Florida Department of Commerce, Washington DC Department of Employment Services (UI call center support), Centers for Medicare and Medicaid Services (worker's compensation).
- Federal experience as well with Medicare and Workers compensation programs.
- FISMA NIST and FedRamp Compliant.
- Remote staff with robust security protocols.
- P- experience standing up call centers with rapid response during the pandemic.
- N- no PFML experience noted.
- N- no State of Maine government experience noted.
- N- concerns about financial viability noted below.

2. Subcontractors

- No subcontractors.

3. Organizational Chart

- Provided org chart with key position definitions and key staff named.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capitol Bridge LLC

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

4. Litigation

- *2 pending matters. None closed in previous 5 years.*

5. Financial Viability

- *D&B provided.*
- *N - Overall Moderate-High business risk.*

6. Licensure/Certification

- *None noted.*

7. Certificate of Insurance

- *Provided.*

II. Proposed Services

1. Services to be Provided

- *99.9% system connectivity.*
- *Hybrid call center approach – office/home agents.*
- *Recruitment strategy page 2 described.*
 - 1. *P – notes experience with employers, professionalism, patience with frustrated callers needed for this project*
- *P- outbound call campaign for failure to complete portal registrations.*
- *Uses random sampling of agent calls for QA with USDOL Benefits Timely Quality review model. 100% of calls recorded.*
- *Works collaboratively with Department on review criteria.*
- *Call center reporting metrics page 7. Real time dashboards for metrics.*
- *Have their own call management system. Cloud based.*
- *Training plan page 9-11.*
- *Can ramp staffing up or down with forecasting.*
- *P – responded concisely to each content area of RFP scope of work.*
- *N/Q – sounds like no Maine agents currently? Hiring from 0.*

2. Implementation – Work Plan

- *Project plan page 13.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Capitol Bridge LLC

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *P – detailed project steps outlined with realistic milestones. Will begin recruitment after award notification to try to meet onboarding milestones.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Previous contracts with Veteran Voices of America and Vietnam Veterans of America.*
- *I/N – proprietary knowledge base using AI. Concerned about accuracy of this.*
- *3rd reference besides above two is "Pet Wellness Direct"*
- *N- concerning lack of large scale projects or projects with State Governments.*
- *N – no PFML experience*
- *N – no State of Maine Government experience.*
- *N – Little business details provided.*
- *N – Severe concerns about the viability of the company based on lack of details provided and lack of B&D sheet.*

2. Subcontractors

- *Not answered?*

3. Organizational Chart

- *Provided basic chart.*

4. Litigation

- *1 current case over wage dispute.*

5. Financial Viability

- *Unable to provide D&B sheet because no Paydex score.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Communication Logic

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

6. *Licensure/Certification*

- *None to provide.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *“cloud based call management system”. What system?*
- *Call routing based on agent knowledge.*
 - 1. *N – what about knowledge gap of the agents?*
- *Potential for email and chat “in same system”.*
- *Train agents on-going with quarterly refreshers and microlearning sessions.*
- *Claims DOL system will be integrated into their system, but no details on what system that is or how.*
- *Call sampling of 10% for quality assurance. All calls recorded.*
- *Post call customer service survey via phone, email or chat.*
- *Metrics tracked noted page 10.*
- *Proactive coaching with agents and feedback loops based on performance.*
- *Can scale up and down based on forecasting.*
- *N – sounds like 0 Maine agents currently so would have to recruit and hire from 0.*
- *N – does not sounds like a lot of agency/role specific training provided at hire.*

2. *Implementation – Work Plan*

- *1 PM, 4 supervisors, 40 agents, 2 QA, and office support.*
- *Project timeline page 24. N - Recruiting all through December? Doesn't seem realistic to meet go live.*
- *N – major concerns with viability of the plan in making go live.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom Communications

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Incorporated 2004, based in Michigan.*
- *Veteran owned.*
- *Several state and government projects, including – SNAP and WIC programs. Support to SSA for SSI programs and federal veteran programs.*
- *Reviewed systems the businesses used.*
- *President and Senior manager staff profiles.*
- *References listed were – Michigan (as subcontracted) for SNAP and WIC, FIS Global, and Conduent for California State disbursement unit.*
- *N- No PFML experience. No UI, DOL, experience? Providing support to employers.*
- *N – no State of Maine Government experience noted.*

2. Subcontractors

- *MI Call Center, owned by owner of Crusecom, will provided staffing.*
- *Bonney Staffing for recruitment of Maine call center employees.*

3. Organizational Chart

- *Provided.*

4. Litigation

- *P – none in past 5 years.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom Communications

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

5. *Financial Viability*

- *D&B provided.*

6. *Licensure/Certification*

- *PCI Compliance self assessment questionnaire provided.*
- *Audit report on system controls provide.*

7. *Certificate of Insurance*

- *Provided*

II. *Proposed Services*

1. *Services to be Provided*

- *Will use Bonney staffing to hire at least 20 Maine agents, rest will be based in Michigan.*
- *Trainer and QA lead will develop agent resource guides.*
- *Proposes NICE cloud based call management system.*
- *Will used skill based routing. Notes several optional features like call back service if a caller doesn't want to wait on hold.*
- *N – notes service implementation (of system?) will need to be AFTER go live date.*
- *NICE quality management system. 100% calls recorded.*
- *Bidder will design call flow on award – understanding call scenarios, map out customer journey, objectives for each call type, call flow stages, decision trees and call scripts, identify escalation protocols, incorporate CRM notes,*
- *Survey on every 25th caller for satisfaction rating.*
- *Metrics noted on page 18.*
- *N- in general the proposed services appeared to lack RFP specific details to Maine proposal. Might be a template?*
- *N- Overall proposed services appear unclear to this specific RFP/project, which creates concern about meeting the quick set up this project.*

2. *Implementation – Work Plan*

- *Project plan provided as a spreadsheet.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Crusecom Communications

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *N- does not provide a clear path of implementation with a description of how the milestones would be achieved.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: DiRAD Technologies

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Founded 1984. Genesys partner in 2000. 2017 call center support to governments.*
- *Women owned since 2014.*
- *Experience in government contracts in New York (elections, children's services, motor vehicles)*
- *3 references are – Memphis gas and water, Convenient MD, Vanguard Direct (for car dealerships).*
 - 1. *N – no large state contracts provided for reference.*
- *N – no PFML experience, or any DOL experience?*
- *N – no experience in State of Maine government.*
- *N – no experience noted with rapid response call centers.*
- *N – concerning that references provided were not government contracts for large state programs.*

2. Subcontractors

- *No subcontractors.*

3. Organizational Chart

- *Provided.*

4. Litigation

- *P- none in the previous 5 years.*

5. Financial Viability

- *D&B provided.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: DiRAD Technologies

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *N – High risk overall rating.*
- *Bidder notes they were surprised by this and say it is a lack of data.*

6. *Licensure/Certification*

- *None noted.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *N – the vast majority of responses to the RFP were “acknowledged” or that the bidder agrees with the requirement. Almost no descriptions about how they would provide these services. Creates severe concerns about the viability of this proposal and the ability to provide the service requested.*
- *Genesys cloud-based system providing the call management.*
- *I/N – AI based reference tools. This is concerning for accuracy of content needed to respond to employers in Maine.*
- *N – proposes AI based translation. This is specifically an issue with Maine populations who do not speak English as a first language, they ask specifically for trained translators and not computer or AI based translation services.*
- *N- does not describe training strategy, recruitment strategy, quality assurance strategy, forecasting strategy.*
- *N – almost no details about services provided make this a non-viable proposal.*

2. *Implementation – Work Plan*

- *A very basic table provided of implementation timelines.*
- *N - No clear plan described of what the work plan would be to hit milestones.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: F.H. Cann & Associates

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Began 1999*
- *Offices in NH, MA, TX*
- *Works with several state programs*
- *Women Based Enterprise (WBE)*
- *Recently – MA SUI, MA DHHS, MA Dept of Revenue*
- *References are – State of New Hampshire Department of Public Health and Human Services, State of Illinois LIHEAP program, US Department of Education Office of Student Financial Aid.*
- *FISMA/NIST certified*
- *P- rapid response call center set up for MA during covid.*
- *I – 25% staff bilingual in Spanish/English*
- *N – no PFML experience*
- *N – no state of Maine government experience.*

2. Subcontractors

- *No subcontractors*

3. Organizational Chart

- *Provided for review*

4. Litigation

- *Numerous settlements noted between 2019-2024, notes that many related to collections work which is contentious.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: F.H. Cann & Associates

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

5. *Financial Viability*

- *D&B provided*

6. *Licensure/Certification*

- *Provided*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Omni Voice system by Finli*
- *P- outbound outreach to prevent issues, provide support to clients proactively*
- *Every phone call can be captured and scored.*
- *Organize knowledge bases on SharePoint, use team chats to support agents with questions.*
- *LMS – Acentis for agent training.*
- *Two tier agents for escalation – more complex questions go to tier 2. Tier 3 goes to DOL staff.*
- *New hire training described on page 23, includes classroom, testing, shadowing, production phases over 4 weeks.*
- *Role playing in training.*
- *Manual call monitoring, speech analytics, post call scoring, coaching.*
- *Score cards for agents.*
- *Customer satisfaction survey page 37 – rating system and scores shown*
- *P- 2% escalation rate*
- *P- customer satisfaction rates*
- *Can upstaff quickly*
- *Some agents remote with good performance.*
- *Recruitment page 57.*
- *Q/N – no Maine based employees currently? Would have to recruit from 0.*
- *Forecasting up or down, bill only what used.*

2. *Implementation – Work Plan*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: F.H. Cann & Associates

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *Project team page 49*
- *Appendix I project plan.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Gatestone

DATE: 10/24/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 5000+ employees with support government and private sector.
- Locations in Arizona, Nebraska, Virginia.
- References provided are – Canada Government (general inquiry support), Kohls, Citizen's Bank.
- N – No PFML experience. No DOL experience noted.
- N – No State of Maine Government experience noted.
- N- none of the references were State based programs or similar PFML type programs.

2. Subcontractors

- No subcontractors

3. Organizational Chart

- Provided.
- Staff roles defined.
- Key staff named.
- Project team bios provided.

4. Litigation

- No litigation noted.

5. Financial Viability

- D&B Provided.
- N- overall business risk Moderate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Gatestone

DATE: 10/24/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

6. *Licensure/Certification*

- *Maine Business License.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *99% system availability.*
- *“we will implement a robust call monitoring system” – what is the system? An example of lack of detail of how they would provide requested services.*
- *Staffing can be increased or decreased based on forecasting.*
- *N-did not describe detailed strategy for recruiting, training, quality assurance, or performance metric measurement and reporting.*
- *Notes a cloud based technology system – what is it?*
- *N – bidder did respond to each RFP criteria in Scope of Work, which is appreciated, but many lacked detail with how they would specifically provide the service. This creates concern that the proposal was not tailored to this specific RFP and the specific needs of the Maine PFML program.*
- *N- Does not sound like any Maine based agents currently so hiring from 0 without articulated plan to achieve 50% staffing by go live date. This is concerning given the difficulties in labor market currently without an articulated plan.*

2. *Implementation – Work Plan*

- *Project plan schedule pages 5-7.*
- *No milestones noted in work plan of recruiting Maine based employees.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Started 1979 and focuses on government clients. 39,000 employees across U.S.*
- *Currently operations 100 call centers in 30 states.*
- *Supports several State of Maine agencies, including DHHS with CoverME program, DOC, Bureau of Insurance, and DAFS.*
- *P- Executive summary well-tailored to understand Maine PFML program needs.*
- *P – notes experience with quick ramp up, MA Dept of Health*
- *P- notes history with other State UI programs*
- *N- no PFML experience specifically.*
- *References provided are – DHHS OHIM (CoverME), Massachusetts of Public Health, Wyoming Child Support Program.*

2. Subcontractors

- *No subcontractors*

3. Organizational Chart

- *Provided.*
- *Staff roles defined.*
- *Key Staff named and bios.*

4. Litigation

- *N – 14 current or prior cases noted in previous 5 years. Several were alleged wage and labor law violations.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Maximus

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

5. *Financial Viability*

- *D&B provided.*

6. *Licensure/Certification*

- *None noted related to project.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *99.99% uptime.*
- *Genesys cloud-based call management system.*
- *Maximus “customer service difference” system – includes hiring right people, comprehensive onboarding, monitoring performance and integrating voice of the customer.*
- *Live monitoring and recorded call QA reviews. 100% of calls recorded.*
- *P- real time metric dashboards through Genesys system. Helps identify trends quickly for quality improvement.*
- *Office in Augusta – can offer remote or office work to Maine agents. Call center manager based in Augusta.*
- *Training plan detailed page 12-13. New hire, nesting, ongoing/refresher, and remedial training.*
- *Notes call forecasting strategy for staffing levels. Acknowledges staffing can move upwards or downwards.*
- *Recruitment strategies page 14-16. Bidder can pool staff nationally but will recruit locally for the 50% Maine employees. Sounds like from 0 Maine agents currently.*

2. *Implementation – Work Plan*

- *Detailed project plan provided.*
- *The company has a project management office that utilizes Project Management Institute principles.*
- *Similar plan used for CoverME project.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: McGhee and Associates LLC

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Very little detail given in this section makes it almost impossible to know anything about the company, including when it was founded, where it is based, who they serve, etc.*
- *Bidder says they have a track record of supporting contracts "like the State of Maine PFML call center scope" but does not provide experience outside of the 3 references. Unclear what experience the company does have.*
- *References given are – Sarasota County Florida, Sarasota County Health Department (redundant person and organization to the first reference), and Housing Authority of Baltimore City.*
- *N – No PFML experience noted. No UI or DOL employer support services noted.*
- *N – No State of Maine Government experience noted. No large-scale State Government contracts noted.*
- *N – No Maine experience or current staff noted.*

2. Subcontractors

- *Not answered.*

3. Organizational Chart

- *Basic org chart provided naming high-level staff.*

4. Litigation

- *Not answered*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: McGhee and Associates LLC

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

5. *Financial Viability*

- *D&B not provided. In conjunction with other missing information in this section there may be grounds for proposal dismissal.*

6. *Licensure/Certification*

- *Not addressed.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *99.9% system availability.*
- *Bidder says they will implement a training program, does not say how or what strategies they use for training.*
- *Says QA will include scoring random calls, providing feedback, and implementing corrective actions. No other details provided.*
- *Acknowledged increased or decreased staffing with forecasting.*
- *Uses Dialpad cloud-based communication system.*
- *Local recruitment of Maine employees would use online job platforms, local advertising, and local employment agencies.*
- *Besides PFML training agents would have “customer service training”, “technology and CRM training”, and “escalation protocol training”, only a couple lines describe each.*
- *N – bidder responses mostly just acknowledge the required scope of work criteria but do not give any details on how they would provide service or what strategies they would use to provide the services. This creates grave concerns about this company providing this level of broad program support.*

2. *Implementation – Work Plan*

- *Very basic project work plan provided noting a few bulleted milestones to achieve for month 1, month 2, and ongoing period.*
- *N – grave concerns about the ability of this company to provide this level of complex and broad services in such a short time frame without a more detailed and considered plan. Especially in the absence of experience of similar projects of this type or scope.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Midtown Group

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP.*

I. Organization Qualifications and Experience

1. Overview of Organization

- *Established 1989, based in Washington DC, and provides services to government clients and private sector.*
- *Women owned business.*
- *Focus on remote workforce for resiliency.*
- *P- varied government project experience including – FEMA, tax administration for county government, Department of Agriculture, Mississippi Child Protective services.*
- *N - No specific PFML experience. No noted UI or DOL experience.*
- *N – No noted State of Maine Government experience.*
- *References include – US Department of Agriculture, Subcontractor to Maximus for Washington DC government support, Southeastern Pennsylvania Transportation Agency, and FEMA.*

2. Subcontractors

- *Cloudhesive for technology and security.*

3. Organizational Chart

- *High level org chart provided.*
- *Staff roles defined.*
- *Key Staff named.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Midtown Group

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

4. *Litigation*

- *P – no litigation in last 5 years.*

5. *Financial Viability*

- *D& B provided.*
- *Overall business risk moderate.*
- *Bidder notes no established history with D&B by choice.*
- *Provided Profit and Loss statement as well.*

6. *Licensure/Certification*

- *FedRamp, PCI, FISMA certifications.*
- *Several ISO certifications*

7. *Certificate of Insurance*

- *Provided*

II. *Proposed Services*

1. *Services to be Provided*

- *99.99% system uptime.*
- *Anticipates 25% of staff bilingual in Spanish/English.*
- *Amazon Connect system for call management. Cloud hosted.*
 - 1. *Utilization of several subservices with Cloudhesive providing the build out?*
- *N- real time coaching to agents with generative AI. Concerns about accuracy and use in State of Maine in general.*
- *Training approach/plan page 9/10. New hire orientation, shadowing, partnering/mentoring, on-going communication.*
- *Acknowledges increased or decreased staffing with forecasting.*
- *Recruitment strategy page 11 – uses technology to identify pool in Maine. Sounds like staffing Maine staff from 0 currently. Unclear if bidder understands unique hiring challenges in Maine.*
- *N – metric tracking/quality assurance process not discussed in depth. Overall proposed services seemed more focused on technology associated with the call system.*
- *N – Customer focus to Maine employers and how to solicit feedback not covered.*

2. *Implementation – Work Plan*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Midtown Group

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *Detailed project plan pages 15-17.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro Inc

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Incorporated 1999.*
- *19000+ employees in 36 countries.*
- *2013 incorporated public sector unit.*
- *N - Bidder presents themselves primarily as technology company and IT helpdesk support. Unclear if their background in call center support specifically? RFP asks for much more than just navigating technology system but answering program questions and walking through wage reporting and private plan application process. Little history mentioned of this kind of support. Concerning lack of understanding of this RFP proposal.*
- *N – No PFML experience. No noted UI or DOL experience.*
- *N – No noted State of Maine Government experience.*
- *N – no experience with general program support noted, rather IT helpdesk assistance.*
- *References are New York City Department of Education, reference 2 also NYC DOE (redundant), Lufthansa Airlines.*

2. Subcontractors

- *Nagarro GS, INC subcontractor.*

3. Organizational Chart

- *Org chart provided.*
- *Staff roles defined.*
- *Key Staff named.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro Inc

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

4. *Litigation*

- *P – no litigation noted.*

5. *Financial Viability*

- *D& B provided.*
- *N- Moderate business overall risk.*

6. *Licensure/Certification*

- *State of Maine Business license.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Agents based in Maine and New York.*
- *N - Services again focus on portal IT help (even using terms such as “ticket” system), and not mentioned as importantly providing program information for employers who are going to be frustrated about their obligations potentially. Unclear if this bidder understands the nature of the RFP as both customer support for a technology portal as well as general program support.*
- *N – commitment to ramping up and down staff unclear, saying it requires “agreement of stakeholders”. Unclear if bidder understands that contract can require ramp down staffing with advanced notice.*
- *N- proposed services unclear, jargon heavy, and not actually tailored with an understanding of the business need in the RFP.*
- *Quality control measured through ongoing reviews, coaching sessions, real time dashboard metrics, and chat/email satisfaction surveying.*
- *Metric table page 19. Examples of metrics tracked provided at end as well.*
 - 1. *P – appears to be robust data tracking and reporting.*
- *Nice VCC call management system.*
- *Training plan starting page 22.*
- *N- recruitment plan unclear, especially as it relates to hiring the Maine based employees, as the State presents many unique*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Nagarro Inc

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

considerations in the workforce that the company has not articulated an understanding in.

2. Implementation – Work Plan

- *N- A general training table is provided pages 32-33 but without enough detail and planning to present confidence in meeting established milestones in the tight implementation timelines.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient BPO

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 50 years' call center experience. Based in New Jersey.
- State government experience in Indiana, New Jersey, and New York.
- Hybrid work approach for collaboration, retention and performance.
- P – experience with Colorado's FAMLI program (PFML program in CO). UI call center experience in New York, New Jersey, and Indiana. Temporary Disability support in NJ. Several of these rapid response during pandemic.
- N – no State of Maine Government experience noted.
- References are – NJ Temporary Disability Insurance, Bureau of Labor Statistics, Indiana Department of Workforce Development.
 - 1. I – FAMLI was not used as reference.

2. Subcontractors

- No subcontractors.

3. Organizational Chart

- Org chart provided.
- Project team named and roles defined.

4. Litigation

- One settled case in the past 5 years.

5. Financial Viability

- D&B provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient BPO

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *N-overall business risk rating of moderate.*
- *N- special event noted page 55 in which Navient barred from servicing federal student loans in a settlement with Consumer Financial Protection Bureau. Allegations of misleading and harming borrowers.*

6. *Licensure/Certification*

- *Formation certificate provided.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Bidder says they agree to all scope requirements.*
- *At least 99% system availability.*
- *Live and recorded call monitoring for quality assurance.*
- *Develops a contract specific OneNote for agents to share pertinent info, MS Teams to ensure communication with agents.*
- *Acknowledges increased or decreased staffing with forecasting.*
- *Annual company training courses include technical training, continuing education, security awareness training, and compliance recertification. Provided through small or large meetings, team meetings, and e-learning.*
- *Quality assurance department randomly screens live and recorded call. Scores initial quality and contract specific metrics based on collaboration with the Department.*
- *Bidder says they provide their own proprietary call management system.*
- *N – metrics and data reporting not covered in depth.*

2. *Implementation – Work Plan*

- *Recruitment strategy listed starting page 10.*
- *Bidder proposes assigning 40 existing agents to meet immediate need, then recruiting 50% Maine staff.*
 - 1. *N – no Maine staff currently and have to trust that bidder would be able to recruit Maine workers with no Maine experience.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Navient BPO

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *15-20 agents to 1 supervisor.*
- *Uses Project Management Institute (PMI) principles.*
- *Project schedule provided page 17*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: PATLive

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Founded 1987. Based in Florida. Currently 205 US based staff.*
- *Clients include government, non-profit, and private sector.*
- *Genesys cloud system.*
- *References are – Florida Department of State Division of Corporations, Florida Department of Health, Florida Housing Finance Corporation.*
- *N- No PFML experience. No noted UI or DOL experience.*
- *N – No Maine Government experience.*
- *Q/N – does not appear to be any experience listed outside of Florida? Creates concern with how effectively they could operate with Maine employees.*

2. Subcontractors

- *No subcontractors.*

3. Organizational Chart

- *Organization chart provided with key staff named on it.*

4. Litigation

- *2 prior settlements noted in the previous 5 years. One of which was an FMLA denial allegation and wrongful termination.*

5. Financial Viability

- *D&B provided*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: PATLive

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

6. *Licensure/Certification*

- *None listed for project.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *At least 99% availability.*
- *Incoming and outbound proactive call support.*
- *Genesys Cloud system for call management.*
- *Can assist the department with development of knowledge base.*
- *Staffing can be moved upwards and downwards based on forecasts.*
- *100% of calls recorded. Says calls scored against “pre-defined quality rubric”*
- *N- total proposed services listed on 3 pages. While the bidder appears to acknowledge all the requirements of the RFP, it does not list details of how they would achieve providing the service.*
- *N- no details on how agents would be recruited in Maine so quickly, no details of how agents would be trained, no details of what data metrics are tracked and how they are reported, no details on quality assurance metrics or process.*
-

2. *Implementation – Work Plan*

- *Basic work plan with goals set as broad months.*
- *N – not a clear path that creates confidence in how the service would be stood up so quickly. Particularly as it relates to recruiting and training at least 50% Maine employees.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Headquartered in Boston, 2000+ employees. Public sector focus since 1986.*
- *Previous experience supporting state programs.*
- *References – State of Maine Office for Family Independence (Medicaid eligibility), Alaska State Department of Health (Medicaid eligibility), Montana State Department of Health and Human Services (Medicaid and Children's Health Insurance Program).*
- *P- previous large-scale contracts with State programs, including State of Maine.*
- *P- previous experience providing rapid response call centers during pandemic.*
- *N – no PFML experience, no noted experience in UI, tax collection, or DOL programs supporting employers noted.*

2. Subcontractors

- *No subcontractors.*

3. Organizational Chart

- *Org chart provided naming key executive staff.*

4. Litigation

- *N - 17 current and past cases listed. Bidder asserts some current previous and past cases covered by confidentiality provisions as well for certain disclosures.*

5. Financial Viability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *D&B provided.*

6. *Licensure/Certification*

- *Full project team bios and qualifications included.*
- *Range of company certifications provided showing expertise in various areas of project team members.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Uses owned staffing affiliate Staffing Solutions Organization to recruit and retain workforce quickly.*
- *Customer satisfaction measured through automated survey at conclusion of call. Quality assurance with randomized spot checks of data entry of agents. Live monitoring of calls.*
- *System available at least 99% of time.*
- *Comprehensive data reporting for the Department (example reports page 6-7). Metrics page 7-8.*
- *Near real time dashboard of business analytics for Department to use.*
- *Technology is Amazon Connect base system for call management, cloud based. Agents bring own device for cost savings with security protocols.*
- *Training approach pages 15-19. Blended learning modules tailored to individuals' needs. Create SOP, deliver initial information, establish performance metrics, change presentations/trainings, feedback loops (Q&A forums, chat forums, etc.), regular updates/refreshers.*
- *Company specific customer service training – HIPAA, data security, customer service, difficult customers/conversations, time management, etc.*
- *Recruitment plan starting page 20. Has a pull of previous agents to pull from. Low attrition rate, particularly among supervisors.*
- *Acknowledges increased or decreased staffing levels with forecasting.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Public Consulting Group

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

2. Implementation – Work Plan

- *Detailed project plan page 26-27 with key milestones mapped out. Recruitment would start precontract start.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Savilinx

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Maine based, women-owned*
- *Founded in 2013*
- *References are – Massachusetts DFML (same as PFML program), Maine State Department of Labor Unemployment Insurance, Maine State Center for Disease Control.*
- *P – currently working as call center support for MA PFML program, lists Bill Alpine as reference.*
- *P – previous experience working emergency response call center for Maine DOL for unemployment insurance during COVID pandemic. Stood up call center very quickly.*
- *P – third project reference also Maine government – Maine CDC to answer resident questions during pandemic.*
- *P – extremely relevant experience with Maine State Government, quickly standing up call center support in rapid responses, and PFML-specific experience.*
- *P – Maine based company that can realistically staff the 50% Maine staffing levels, and can understand the unique needs of Maine employers.*

2. Subcontractors

- *No subcontractors.*

3. Organizational Chart

- *Detailed org chart provided.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Savilinx

DATE: 10/7/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

4. *Litigation*

- *P- no current litigation and none in previous 5 years.*

5. *Financial Viability*

- *D&B provided.*

6. *Licensure/Certification*

- *Data security compliance noted.*
- *WBE, Hubzone*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Prelaunch planning, launch/training/implementation*
- *At least 50 % Maine staff, rest based in Mississippi.*
- *Listed knowledge areas that agents will need to support in new contributions portal.*
- *Random call sampling, coaching, on-going training of agents.*
- *Weekly QA calls with department on QA ratings, top 5 issues of calls, etc.*
- *Will develop Customer satisfaction survey will Dept.*
- *Data driven approach – screenshot of call dashboard.*
- *P – DOL staff can have access to the call dashboard to get metrics in real time.*
- *Lists out the prescribed collaboration meetings.*
- *Call management system is Five9 – reliable and secure. PCI compliant.*
- *Initial trainings and on-going agent trainings.*
- *Can staff upwards or downwards based on forecasting.*
- *P - Has Maine presence currently - can realistically staff up to the 50% quickly based on current staffing.*

2. *Implementation – Work Plan*

- *Project plan page 14.*
- *Positions listed for each work step.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: ShyftOff Corp

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Says staffing built of "gig workers" to provide cost savings.*
- *Unclear when company started and how many employees it has. D&B not provided as requested to verify business information.*
- *Company says it provides services in 35 states but unclear to who besides the 3 references provided.*
- *Refences provided are Citizens Insurance of Florida, Hello Heart digital cardiovascular service (no telephone number provided), and National Rural Telecommunications Cooperative.*
- *N- Very little business information provided creating grave concerns about what the company does and its ability to take on a project of this size and impact.*
- *N- No PFML experience noted. No government contracts noted.*
- *N- No State of Maine government experience noted.*
- *N- No experience setting up rapid response call centers noted.*
- *N- Concerns about the staffing model providing the support needed to provide to Maine Employers navigating a large program for the first time.*

2. Subcontractors

- *No Subcontractors.*

3. Organizational Chart

- *High level org chart provided.*
- *Key executive staff named.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: ShyftOff Corp

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

4. *Litigation*

- *P- No litigation noted in previous 5 years.*

5. *Financial Viability*

- *D&B not provided by choice, saying the company will buy it if “considered for the work”.*
- *N- did not follow basic requirement of this section, could be grounds for dismissal entirely.*

6. *Licensure/Certification*

- *None noted for this project. AWS is Soc-2 certified.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Gig-powered platform provides “flexible, remote model that ensures high performance and reliability”.*
 - 1. *N – no large government projects of this magnitude to support that assertion. There are grave concerns about this staffing model for a project of this size and impact.*
- *Says staffing model approach provides costs savings.*
- *Says AI matches agents with project.*
- *Project manager assigned to each project using JIRA project management and RACI charts.*
- *Review of data security protocols on pages 15-16 for the remote agents.*
- *Generic statements about training, oversight, collaboration, quality assurance.*
- *N – it appears this section is stock language and not tailored at all to the RFP or the business need that the State of Maine is asking for. It’s unclear if the bidder understands the business need at all and does not articulate any strategies for meeting the specific requirements of this specific RFP.*

2. *Implementation – Work Plan*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: ShyftOff Corp

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *Gives a basic description of high-level project milestones without any detailed schedule, steps to achieve, or strategies used.*
- *N – Severe concerns that the bidder does not have a viable plan to provide the services requested in the timeframes required.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Solix, Inc.

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Established 2000 headquartered in New Jersey. 800 Staff.*
- *Experience in small business support, healthcare plan enrollment, and low-income assistance programs.*
- *Project references are – Blue Cross Insurance in Alabama, Morris County in New Jersey (small business grant program), Direct Car Innovations*
- *N – no PFML experience. No UI or DOL experience noted.*
- *N- no State of Maine Government experience noted. No contracts for any state government noted. Unclear if the company has taken contract of this scope and timeline based on experiences noted.*

2. Subcontractors

- *No subcontractors.*

3. Organizational Chart

- *Top level org chart provided with Key staff named.*

4. Litigation

- *2 prior cases noted in last 5 years.*

5. Financial Viability

- *D&B provided.*

6. Licensure/Certification

- *None provided relevant to this project.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Solix, Inc.

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

7. Certificate of Insurance

- *Provided.*

II. Proposed Services

1. Services to be Provided

- *System availability at least 99% of time.*
- *Remote agents including Maine agents. Recruitment strategy page 2 – utilize existing relationships with staffing agencies.*
- *NICE inContact is the call management system.*
- *Quality assurance through – call reviews, performance audits, adherence to predefined service standards.*
- *Uses customer feedback to identify areas for improvement – think, do, study, act approach.*
- *Will provide Business Analytic dashboard for Department staff to track data, as well as traditional data reports. Metrics tracked listed page 5-9.*
- *Q - Mentions unemployment policy expertise in call scripting? Did not see a project noted on this in file 2. Later clarified this is the policy advisor on the project, but unclear if the company has had any project experience in UI.*
- *Training plan starts page 12. Uses ADDIE (Analyze, Design, Develop, Implement, and Evaluate) and SAM (Successive Approximation Model) models.*
- *4 level new hire report cards – in class participation, knowledge assessments, post training skill assessments, performance evaluations.*
- *Acknowledges increasing or decreasing staff levels based on forecasting.*

2. Implementation – Work Plan

- *Project timeline and graph provided with important milestones noted.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: The Connection

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *43 years with customers in government and private sector. Based in Minnesota.*
- *Previous experience supporting US IRS for online filing requirements.*
- *References are – Illinois Department of Financial and Professional Regulation, Community and Economic Development Association of Cook County (LIHEAP support), Illinois Department of Commerce and Economic Opportunity (LIHEAP and community block grants).*
- *I – IRS was not listed as a reference project when noted as experience.*
- *P – experience with State programs and rapid response call centers.*
- *N- No direct PFML experience. No UI or DOL experience focused on employers noted.*
- *N- No State of Maine Government experience. Unclear if any experience with services in Maine at all. Notes that staff have visited Maine.*

2. Subcontractors

- *No subcontractors.*

3. Organizational Chart

- *High level org chart provided.*
- *High level staff roles defined.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: The Connection

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

4. *Litigation*

- *P – no litigation in past 5 years.*

5. *Financial Viability*

- *D&B provided.*

6. *Licensure/Certification*

- *Appear to have missed this. Certificate of Insurance provided as section 6.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Years experience with office and remote work services.*
- *Acknowledges increasing or decreasing staffing based on forecasting.*
- *Training includes instructor led, self-paced trainings, and on the job training. Roleplaying scenarios to have agents practice common scenarios.*
- *Tier system of agents – more knowledgeable agents will be higher tiers for more complex situations/questions.*
- *All calls recorded. Live call monitoring for coaching and immediate intervention if needed. Monitor 6% typically of calls.*
- *Omni-Channel platform for call management.*
- *Use internally developed and proprietary knowledge base system, scripting, FAQ, call handling procedures.*
- *Account Manager provided for the project and reports directly to the President of the Company.*
- *Metric reporting sent by email daily.*
 - 1. *Q – is there a dashboard?*
- *N – unclear what recruitment strategy is specifically for the Maine based employees. It sounds like the company is hiring from 0 Maine staff currently and may not have previous hiring experience in Maine to understand the unique challenges in the Maine workforce.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: The Connection

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

2. Implementation – Work Plan

- *Executive staff named and short bios of qualifications.*
- *Detailed project plan with important milestones pages 11-14*
- *N – hiring in a week for Maine agents does not seem viable, in absence of a more descript plan or strategy to do so.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Triple Impact Connections, Inc.

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Founded 2017. Based in Texas.*
- *Veteran owned. Employs primarily family members of active-duty service members.*
- *References include – Pentagon Federal Credit Union, Kipany, Qdoba Mexican Eats.*
- *N – no PFML experience. No UI or DOL experience noted.*
- *N – no State of government experience noted. No experience with any large State or governmental contracts noted.*
- *N – no experience with rapid response call centers noted.*

2. Subcontractors

- *Did not see this area addressed in files provided.*

3. Organizational Chart

- *Basic unit org chart provided with staff roles (operations manager, team lead, and service agents) defined.*

4. Litigation

- *This section was not addressed.*

5. Financial Viability

- *D&B provided.*
- *N- Overall moderate business risk.*

6. Licensure/Certification

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Triple Impact Connections, Inc.

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *Section did not appear to be addressed in files provided.*

7. Certificate of Insurance

- *Provided.*

II. Proposed Services

1. Services to be Provided

- *Unit team would be 1 program manager, 2 QA team leaders, and 40 agents.*
- *Technology system is NICE/CX One call management system, cloud based.*
- *Metrics tracked would be calls offered, calls handled, calls abandoned, % abandoned, average speed of answer, average call handle time, call outcome codes. Emailed to department daily. Weekly and monthly reporting on performance metrics.*
- *Acknowledges staffing adjustments based on forecasting.*
- *N – proposed services 3 pages in total without a sufficient level of detail provided to create confidence services could be provided of a project of this scope and impact.*
- *N- no in-depth strategy for training, quality assurance, and recruiting articulated. Of particular concern is the lack of strategy as it relates to meeting the 50% staffing with Maine based employees on a short time frame.*

2. Implementation – Work Plan

- *Project chart provided but not with any schedule of important milestones and how to meet them. All dates listed as “due” 12/1/24. Ramp plan notes 20 agents would be ready for training 12/2 but when does recruitment happen to achieve that?*
- *N- concerns with project plan that the services requested could be provided on time.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Velocitii Contact Center Services

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Founded 2014. Based in NY.*
- *Have agents currently in NY, FL, PA, TX, and SC. Utilizes remote work strategy. Focuses on company culture to retain talent.*
- *Executive staff role qualifications listed.*
- *References include – Casella Waste management, Wellabe (insurance), Hagerty (car insurance).*
- *N – no PFML experience. No UI or DOL experience with employer support noted.*
- *N – no Maine State Government experience. No experience noted with any large scale governmental projects.*
- *N- no experience noted with rapid response call centers.*

2. Subcontractors

- *No subcontractors.*

3. Organizational Chart

- *Org chart provided.*
- *Major staff roles defined.*

4. Litigation

- *Notes no current litigation.*

5. Financial Viability

- *Snapshot provided, but does not have a D&B overall business risk rating.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Velocitii Contact Center Services

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *N – concerns about lack of financial data for this company.*

6. *Licensure/Certification*

- *None provided for this project.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Hiring process focused on staff engagement for retention.*
- *Training cycle – client specific training, shadowing, nesting, tenured (periodic evaluations and coaching), performance plan (for increased needs), onboarding training. Training feedback from participants to continue to develop meaningful training.*
- *Sample training day schedules provided.*
- *Quality assurance – more or less QA screening based on agent tenure, evaluation forms developed with client objectives.*
- *Some recommended KPIs proved on page 6 and developed with client. All employees received monthly review on their KPIs.*
- *Notes cloud-based call management system. Says they may use specific systems, like Five9, depending on needs of the State. Five9 allows for customizable reporting including dashboards.*
- *Customer satisfaction measured with after-call surveys.*
- *N – not a lot of details in the recruitment strategies, particularly as it relates to the hiring of 50% staffing in Maine on a quick turnaround.*

2. *Implementation – Work Plan*

- *Project timeline and project plan provided pages 9-11. Most of the tasks were not mapped out with specific target dates or strategies to achieve.*
- *N – concerns about this company delivering the requesting services of a project of this scope and impact within the tight timelines, especially given the lack of experience with government projects and clients.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

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 Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 27 years in business.
- Women owned business.
- Mostly remote workforce, including 100% remote agents.
- Clients include Toyota, Southwest Airlines, Boscov, Medline. Health care and benefits 10% of clients.
- References are – Intuit Turbo Tax, FedPoint (employee benefit programs), Toyota Connected.
- N – No PFML experience. No UI or DOL experience with employer support.
- N- No State of Maine Government experience. No experience noted with any large-scale public-sector clients.
- N – No rapid response call center experience noted.
- N – No experience in or current employees in Maine noted.

2. Subcontractors

- No subcontractors

3. Organizational Chart

- List of Executive staff name and titles provided.
- Key staff roles defined. Some key staff named.

4. Litigation

- P- no litigation noted in last 5 years.

5. Financial Viability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409163

RFP TITLE: PFML Temporary Call Center Support

BIDDER NAME: Working Solutions

DATE: 10/8/2024

EVALUATOR NAME: Luke Monahan

EVALUATOR DEPARTMENT: Department of Labor

- *D&B not provided by choice.*
- *N – this is against the requirement of RFP. May be grounds for dismissal of proposal.*

6. *Licensure/Certification*

- *Discusses security and confidentiality policies and practices.*

7. *Certificate of Insurance*

- *Provided.*

II. *Proposed Services*

1. *Services to be Provided*

- *Discusses AI-based recruitment program to find qualified candidates in a large labor pool.*
- *Doesn't expressly acknowledge increasing or decreasing staffing based on forecasting, saying instead they will "build a staff schedule that adheres to the volume lock".*
- *Training approach pages 4-5. Train the Trainer (learning from Department to train agents), curriculum development, education (information, role play, nesting). AI utilized in training process.*
- *Canvas learning management system for on-going education includes games, simulations, microlearning and role playing.*
- *Collaborative approach to building agent score cards and KPIs with clients.*
- *Power BI for data reporting.*
- *Bidder recommends Bright Pattern as call management system.*
- *Company used to upholding PCI and HIPAA standard data privacy standards.*
- *Program team roles defined.*

2. *Implementation – Work Plan*

- *Provided a sample implementation plan (not tailored to this project).*
- *N – extremely concerning that the company has not identified project milestones and timeline for this RFP and how they would meet those milestones on short a short time frame. This is especially concerning given the lack of experience in large scale government or public sector contracts.*



STATE OF MAINE
DEPARTMENT OF LABOR

Janet T. Mills
Governor

Laura Fortman
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support

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

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

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

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

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

Signed by:

Judith Shaw

51E7ECE8A6FD423...
Signature

10/7/2024

Date



STATE OF MAINE
DEPARTMENT OF LABOR

Janet T. Mills
Governor

Laura Fortman
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support

I, Luke O. Monahan accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Labor. 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:

Luke O. Monahan

8386474D98734F4

Signature

10/7/2024

Date



STATE OF MAINE
DEPARTMENT OF LABOR

Janet T. Mills
Governor

Laura Fortman
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409163
RFP TITLE: PFML Temporary Call Center Support

I, Rene LeBlanc accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Labor. 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:

Rene LeBlanc

Signature

10/7/2024

Date