

**State of Maine
Master Score Sheet**

RFP# 202406113			
Professional Training and Certification Services			
Bidder Name:		USM	Woodfords Family Services
Proposed Cost:		\$ 955,102.00	\$ 3,940,755.23
Scoring Sections	Points Available		
Section I: Preliminary Information	Pass/Fail	Pass	Pass
Section II: Organization Qualifications and Experience	35.00	28.00	27.00
Section III: Proposed Services	40.00	32.00	27.00
Section IV: Cost Proposal	25.00	25.00	6.06
TOTAL	<u>100.00</u>	<u>85.00</u>	<u>60.06</u>

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner



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

Award Justification Statement
RFP# 202406113
Professional Training and Certification Services

I. Summary

Through RFP# 202406113, the Department sought proposals for Professional Training and Certification Services. Two (2) Bidders responded to the RFP:

- University of Maine System acting through Univ. of Southern Maine
- Woodfords Family Services

Through the evaluation process, University of Southern Maine was the highest scored Bidder and determined to provide the best value to the State of Maine.

II. Evaluation Process

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

III. Qualifications & Experience of Conditional Awardee

The University of Southern Maine offered an accomplished, experience-laden portfolio demonstrating the ability to deliver the services required by the RFP and successfully perform under the prospective contract.

IV. Proposed Services by Conditional Awardee

University of Southern Maine provided a well-rounded response outlining an understanding of, and ability to meet, programmatic requirements of the RFP. Additionally, the University of Southern Maine demonstrated the means and skills necessary to meet the RFP's performance requirements through its project teams' competencies, subject matter expertise, and background.

V. Cost

University of Southern Maine proposed a cost of \$955,102.00.

VI. Conclusion

Out of 100 possible points, University of Southern Maine scored 85.00, which was the highest point total awarded by the Evaluation Team. The strength of the University of Southern Maine's proposal includes strong organization with relevant experience, a completely proposed scope of service, and a competitive cost proposal. The Evaluation Team has determined the proposal submitted by the University of Maine System acting through Univ. of Southern Maine represents the best value to the State of Maine.

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Feb-21-2025

Via Electronic Mail: emily.stultz@maine.edu

Univ. Of Maine System acting through the Univ. of Southern Maine
Emily Stultz, DSW, LCSW, Policy Associate II
Haynes Building, 12 East Chestnut Street
Augusta, ME 04330

SUBJECT: Notice of Conditional Contract Award under RFP # 202406113 Professional Training and Certification Services

Dear Ms. Emily Stultz,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of Child and Family Service for Professional Training and Certification Services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Univ. Of Maine System acting through the Univ. of Southern Maine

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

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

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

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

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

Sincerely,

DocuSigned by:

Bobbi Johnson

124E262DB45B4A5...

Bobbi Johnson,
Director
Office of Child and Family Services

DocuSigned by:

Debra Downer

5DC6307B8558482...

Debra Downer
Deputy Director for Competitive Procurement
Division of Contract Management

Janet T. Mills
Governor

Sara Gagné-Holmes
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Feb-21-2025

Via Electronic Mail: rfreudenberger@woodfords.org

Woodfords Family Services
Renée Freudenberger, Director of Training & Professional Development
15 Saunders Way, Suite 700
Westbrook, Maine 04092

SUBJECT: Notice of Conditional Contract Award under RFP # 202406113 Professional Training and Certification Services

Dear Ms. Renée Freudenberger,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of Child and Family Service for Professional Training and Certification Services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Univ. Of Maine System acting through the Univ. of Southern Maine

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.

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

Sincerely,

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Director
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Debra Downer

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Debra Downer
Deputy Director for Competitive Procurement
Division of Contract Management

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER: University of Maine System acting through Univ. of Southern Maine

DATE: December 4, 2024, January 27, 2025

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Stacy Martin

Names of Evaluators: Daniel Dresser, Chelsea Barry, Miranda Whalen, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	28.00
Section III. Proposed Services	40.00	32.00
Section IV. Cost Proposal	25.00	25.00
<u>Total Points</u>	<u>100.00</u>	<u>85.00</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER: University of Maine System acting through Univ. of Southern Maine

DATE: December 4, 2024, January 27, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- | |
|--|
| <ul style="list-style-type: none">• Demonstrated at least five (5) years' experience in the last ten (10) years, training adult learners, learners from different cultural backgrounds, and individuals who provide direct support services. |
|--|

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER: University of Maine System acting through Univ. of Southern Maine

DATE: December 4, 2024, January 27, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	28.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) valid project examples. • Center for Learning (CFL) is part of the Catherine Cutler Institute at the University of Southern Maine; has access to the University’s infrastructure, research capabilities, and faculty expertise. • 28 years of managing certification and training programs including Maine’s Mental Health Rehabilitation Technician certification. • Designed and delivered specialized curricula for Maine’s workforce, training pathways for emerging roles, and creation of hybrid training delivery systems (asynchronous and live elements blended). • Founding member of Maine Behavioral Health Workforce Development Collaborative working with federal and state agencies, such as SAMHSA (Substance Abuse and Mental Health Services Administration), Maine DHHS – OBH and OADS, and other academic institutions such as Maine community colleges.
2. Subcontractors
<ul style="list-style-type: none"> • Plans to subcontract with Co-Occurring Collaborative Serving Maine to support grant proposal, training and certification processes.
3. Organizational Chart
<ul style="list-style-type: none"> • Met the requirements.
4. Litigation
<ul style="list-style-type: none"> • Provided three (3) litigation cases; one (1) case is resolved and the remaining are still active.
5. Financial Viability
<ul style="list-style-type: none"> • Met the requirements and appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid COI.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

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DATE: December 4, 2024, January 27, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	32.00

Evaluation Team Comments:

Part IV, Section III Proposed Services

1. Services to be Provided

Part II

A. Facility Standards and Requirements

- Indicates having multiple locations but did not provide details as to the locations of the offices or number of locations.
- Plans to provide technical support through phone and email.
- Automated phone and email systems are available outside of operating hours to provide guidance for urgent matters.
- Will provide a pre-screening checklist.
- Will provide integrated reporting.
- Training is available 24/7.
- The learning management system (LMS) will provide automated reminders of upcoming deadlines to ensure learners maintain compliance with requirements.
- Live training will be conducted virtually and in person and include breakout rooms, real-time polls, and Q&A sessions.

B. General Curriculum and Training Requirements

- Will provide online, in-person through the existing LMS.
 - Virtual will be interactive with the trainers.
 - Offline access will be available for individuals with limited internet.
 - Learners will be able to select formats that work better for the individual.
- Expects certification success goal to be 80% or higher.
- Training styles include live interactions such as role-playing and scenario-based exercises, visual elements such as infographics and videos, auditory resources such as recorded lectures and discussion groups.
- Plans to use pre- and post-training assessments, feedback from field supervisors, and post-certification surveys to evaluate effectiveness with the aim of learner satisfaction rate of 85% or higher and 90% of participants demonstrating skill readiness for their role.
- Knowledge checks will include multiple choice, short answer and scenario based questions to assess comprehension.

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- Will have peer review exercises.
- Blended courses that allow instructors to observe and give feedback.
- Review committee with experts consisting of subject matter experts, instructional designers and program staff to ensure quality of training.
- Plans to utilize multimedia consisting of various videos and animations.
- Quality Assurance testing and pilot testing.
- A network of qualified trainers will rotate in-person sessions regionally across various time slots.
- Flexible enrollment opportunities to accommodate staffing changes.
- Live days will include evenings, weekends, and traditional hours.
- Plans to provide monthly calendar outlining live and virtual classes.
- 35 hours of online and 15 hours of live sessions for DSP training.
- Plans to utilize scheduling tools to help facilitate completion.
- 24/7 access to online training modules.
- Virtual and in-person instructor-led trainings.
- Trainings available in the evenings, weekends and during normal business hours.
- Real time enrollment tracking to adjust frequency and time of trainings as needed.
- In-person training will be rotated in each region based on need.
- Behavioral Health Professionals (BHP) training will be 35 hours, 12 modules and a 7-hour live instructor-led training.
- Will adhere to a schedule of reviews, including semi-annual reviews with a priority for regulatory changes, evaluation feedback, and emerging industry trends.
- Curriculum will be designed with learner needs in mind: closed captions, transcripts, screen reader compatibility, customizable to roles or skill level.
- A curriculum management system will be utilized to store approved content, track updates, and notify trainers and trainees of changes.
- Incorporation of new guidelines, competencies, and procedural requirements will be integrated into the curriculum within 30 days of notification.
- Will maintain documentation of approved updates.
- Trainers will have real-time updates through the curriculum management system.

C. Information Technology

- Provided an outline and criteria for the LMS system.
- Will ensure SCORM compliance.
- Will use existing Moodle-based LMS currently used by the CFL for Maine MHRT-1, MHRT/C, MHRT/CSP, MHSS, and CIPSS curricula.
- Plans to develop a website for a central hub for all training that will work across multiple devices and comply with WCAG to ensure accessibility.
- Plans to integrate a content management system (CMS) for content updating, allowing state staff to make updates without requiring technical expertise.
- Plans to include an interactive calendar.
- Online help desk portal, phone number and email for technical support.

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TEAM CONSENSUS EVALUATION NOTES**

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- Plans to provide a resource library with video tutorials and troubleshooting guides to be available at all times.
- After hours support system for urgent matters.
- Service Level Agreement (SLA) and issue resolution process.
- Agrees to adhere to required policies and referred to the Technical Assessment form (Appendix G) for specific policies.
- Currently meet NIST 800-53 Rev 5 requirements.
- Plans to follow NIST standards.
- Plans to utilize role based and Multifactor Authentication (MFA).
- Did not address restoring data completely to their status at the time of the last backup but state that custom backups can be created.
- Agrees to abide by language stipulated in the RFP but their current policy does not meet these response times.

C. Core Pathways

- Peer mentorship will be used to match new participants with experienced BHPs and DSPs for guidance.
- Customized content to address specific participant roles, such as family members, natural supports, and self-advocates.
- Case studies across different environments.
- Trainers can adapt training examples for BHP or DSP.
- Pilot testing with BHPs, DSPs, family and self-advocates.
- Will emphasize universal competencies.
- The LMS will track progress and verify that Core Pathways have been completed before participants can register for next pathways.
- Will require an assessment with requirements.

D. BHP Pathways Training and Certificate Program

- LMS will flag trainees with provisional certificates and send reminders to complete the training.
- Certification Coordinator will verify completion records before issuing certificates.
- Completed certificates will be retained for future verification.
- Will retain Master Trainers to meet efficient delivery.
- Create a scalable pool of certified instructors and ensure all proper documentation requirements are met.
- Provide professional development to ensure consistency in training.
- OQMHP will be reviewed daily.
- Certifications will be given electronically or via mail based on the applicant's preference.
- Automatic reminders processed by a centralized tracking system will ensure applications are processed within the time frame.
- Recommendation for competency-based assessment, continued education, supervision and mentorship program.

E. DSP Pathways Training and Certification Program

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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RFP TITLE: Professional Training and Certification Services

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DATE: December 4, 2024, January 27, 2025

- Plans to adhere to strict policies.
- The LMS system will document all essential details.
- All records will be maintained for all certifications.

F. BHP and DSP Pathways Manuals

- Updates will be distributed to personnel, instructors and agencies through a secure digital platform.
- Quarterly reviews to ensure content is relevant and updates are documented and submitted to the Department.

G. Customer Service

- Satisfaction survey will be analyzed quarterly.
- Post-training knowledge and skills assessment results will be placed into reports to see strengths and skill gaps for future development and will be contained within the LMS to be available immediately upon completion of modules.
- Tracking system will monitor response rates and prompt follow ups as needed.
- Satisfaction and preparedness surveys will be distributed via an online platform.
- Responses to client inquiries expectations are 24 hours for email and 4 hours for urgent calls.
- Training includes effective communication, empathy and cultural competency.
- Workshops on professionalism, conflict resolution, including de-escalation techniques, boundary setting and reflective practices with quarterly refresher sessions.
- Feedback and complaints are documented with structured process for resolutions.
- Client centered approach to customer service.
- Outlined all their training and policies.
- Partnerships will be formalized through Memorandums of Understanding (MOU) to outline roles, expectations, and shared objectives.
- Policy highlights ethics, confidentiality, accountability and cultural competence.
- Provided a full narrative and understanding of professionalism.

H. Additional Support

- Triage of after-hours messages will be completed each morning.
- Dedicated phone line and email address and an online help desk portal to submit tickets, track progress and access a FAQ.
- Real-time support during business hours and after-hours support for urgent technical issues.
- Quarterly refresher workshops for instructors.
- Agency IT staff will receive periodic training on the LMS to manage some issues internally.
- Conduct needs assessment focusing on certification data, agency size, client demographics and projected training needs. Agencies will be prioritized based on deadlines, volume of services and geographic challenges.
- Monthly informational webinars with live Q&A, updates on certification deadlines, training requirements and resources.

**STATE OF MAINE
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- Agencies will be assigned dedicated support contact for bi-weekly check-ins.
- Partnership program to facilitate collaboration with certified agencies and non-certified agencies.
- It is unclear if their proposed plan to utilize discounted training fees, stipends and financial incentives program is appropriate since training is free to agencies.
- Dedicated paths for verification requests.
- Inquiries will be reviewed within 2 business days.
- Responses will go through a secondary review to ensure accuracy before finalizing a prior certification.
- Monthly review to ensure the fifteen-day requirement is met.

I. Quality Assurance

- Plans to implement a QA program.
- Participants will be sent reminders of incomplete modules and have access to coaching and technical support.
- Surveys will be provided on participant satisfaction and training effectiveness.
- Research review of evidence-based practices.
- Adhere to ADA requirements.
- Plans to conduct regular evaluations to identify system priorities and gaps in knowledge or skills. It was unclear how often these evaluations will occur.
- Specialized training modules based on need.
- Trainers will have access to consultations on enhancing teaching techniques.

J. Workforce Development Activities

- Met the requirements.

K. Staffing and Staff Qualification

- Plans to require official copy of certification and it will be verified with Maine College of Direct Support.
- Certification status will be tracked, and alerts will be issued as expiration dates approach.
- Annual refreshers and continued education will be part of professional development.
- Quarterly audits of certifications.
- Plans to utilize a tracking system to monitor expiration dates and send reminders before renewal dates.
- Will send reminders for upcoming continued education.

M. Records and Reporting

- LMS will track progress with reports generated monthly, quarterly and annually.
- Reports will show actionable recommendations based on trends and feedback.
- BHP and DSP will track completed modules and certification status. OQMHP will show training sessions attended and progress.
- Regular data quality checks to ensure accuracy and reliability of records.
- The Certification database is updated in real time.
- The Department will be able to generate custom reports.

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TEAM CONSENSUS EVALUATION NOTES**

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N. Performance Measures
<ul style="list-style-type: none">• Met the requirements.
O. Reports
<ul style="list-style-type: none">• Met the requirements.
2. Staffing
<ul style="list-style-type: none">• Provided a detailed list of position titles and job descriptions.• Plans to provide a dedicated staff member to be the primary point of contact for each subcontractor.• Plans to utilize a project management platform for communication, task tracking and collaboration with subcontracts, consultants, and internal staff.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided a detailed work plan for the implementation of the program.• Provided a reasonable timeline for the proposed LMS Solution.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$ 955,102.00	÷	\$ 955,102.00	x	25.00 points	=	25.00

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER: Woodfords Family Services

DATE: December 4, 2024, January 27 & 31, 2025

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Stacy Martin

Names of Evaluators: Daniel Dresser, Chelsea Barry, Miranda Whalen, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	27.00
Section III. Proposed Services	40.00	27.00
Section IV. Cost Proposal	25.00	6.06
<u>Total Points</u>	<u>100.00</u>	<u>60.06</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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RFP TITLE: Professional Training and Certification Services

BIDDER: Woodfords Family Services

DATE: December 4, 2024, January 27 & 31, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- | |
|--|
| <ul style="list-style-type: none">• Demonstrated at least five (5) years' experience in the last ten (10) years, training adult learners, learners from different cultural backgrounds, and individuals who provide direct support services. |
|--|

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER: Woodfords Family Services

DATE: December 4, 2024, January 27 & 31, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35.00	27.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Provided three (3) valid project examples. • Nonprofit organization founded in 1967 with a variety of clinical, educational, behavioral health, family, and community support programs statewide. • Working with children with Developmental Disabilities since 1967. • Operate a Training and Resource Center (TRC), operating for over 15 years, offers 18 different trainings and 8 certifications to 2,000 individuals annually. • In 2024, offered 348 live courses to 2129 adult learners. • Council on Accreditation (COA) certification. • Experience working with people from diverse cultural backgrounds.
2. Subcontractors
<ul style="list-style-type: none"> • GreenLight Websites to create customized websites. • Relias provides the LMS for the BHP Training and certificate program. • Baker Newman Noyes, LLC for accounting, SOC 2 auditor. • Stoop Kid Pictures for videography provider. • Feathr for digital experience, surveys, social media. • Elsevier for information and analytics.
3. Organizational Chart
<ul style="list-style-type: none"> • Provided an organizational chart.
4. Litigation
<ul style="list-style-type: none"> • Provided one (1) litigation case which was settled.
5. Financial Viability
<ul style="list-style-type: none"> • Met the requirements and appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided a valid COI.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER: Woodfords Family Services

DATE: December 4, 2024, January 27 & 31, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	27.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Locations in Kennebec, Westbrook, and soon in Manchester, and shared spaces in Waterville, Bangor and Presque Isle. • Indicates having the capacity for mobile technology. • Administrative hours are Monday-Friday 8 a.m. to 5 p.m. • Plans to provide extended hours 24/7 through self-service, automated, and AI customer service, as well as an on-call technician as needed. • Provided a plan to determine eligibility. • Has an LMS to assign, track training and certifications and re-certifications. • LMS will pre-populate appropriate training for learners. • Plans to utilize live module training and live trainings.
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • Will offer virtual and in person training. • Multi-year phased transition plan for DCP pathways training and certification. • Provided phases in detail of the different programs and plans. • Interactive elements will be used every 7-10 minutes during online and live content delivery. • Plans to use evidence based, combination on learning styles and techniques such as discussions, group activities, gamification, fill-in workbooks, self-reflective exercises and videos and others. • Training will have audio, video, graphics, text and closed captioning. • Training will use learner interactions and knowledge checks before, during and after modules. • Quizzes need a score of at least 80% to pass. • Will require comprehension checks every 7 to 10 min. • Will adapt training schedule based on need. • Provided a diagram of possible training structure.

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BIDDER: Woodfords Family Services

DATE: December 4, 2024, January 27 & 31, 2025

- Plans to meet or exceed the current 50-hour training requirement.
- Provided a detailed training schedule including evening and weekend hours available for live training sessions.
- Plans to work with the Department to address the differences between the ongoing BHP and DSP certifications.

C. Information Technology

- Plans to utilize Relias learning management system.
- May utilize other subcontractors to accommodate the increase in learners.
- Plans to rebrand and update the existing website to meet these requirements.
- Plans to provide self-service, automated and use AI enhanced technology but lacked details regarding the use of AI to determine if this aligns with MaineIT policy.
- Plans to utilize tech support provided by the selected LMS vendor.
- Plans to maintain an email address and phone number specific to the program, which will be monitored to address tech support on nights and weekends.
- Plans to meet the requirements of the NIST 800-53 Rev 5.
- Plans to provide the requested information to the Department.
- Will utilize a SQL server database, Office365, PowerShell, and spreadsheets.
- Plans to use established comprehensive policies and procedures.
- Did not address encryption methods, only describing tiered access for security and permissions.
- Plans to utilize Multi-factor authentication (MFA).
- Will utilize local hyper converged backups, local off-site backups and cloud-based disaster recovery backups.
- Plans to collect hourly backups that overwrite every ten (10) hours, nightly backups are stored for one (1) week, monthly backups that are stored for one (1) year and annual backups that are stored indefinitely.

C. Core Pathways

- Plans to maintain a distinct tracking system for non-provider agency affiliated learners.
- LMS will have a customized training plan for learners and ensure that learners complete the Pathway training before moving forward.
- All BHP and DSP pathway certifications will be searchable in the LMS database.
- Plans to make Core Pathways a pre-requisite.

D. BHP Pathways Training and Certificate Program

- Plans to provide a form to determine if learners meet eligibility requirements.
- Will track training completions in the LMS.
- Plans to enroll seniors participating in vocational programs with the Departments permission.
- Did not address ensuring trainees complete the provisional BHP Pathways Certification within thirty (30) calendar days of hire and the relevant BHP Pathways

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER: Woodfords Family Services

DATE: December 4, 2024, January 27 & 31, 2025

training within one (1) year of hire, or as otherwise stipulated in applicable MaineCare and State licensing rules and regulations.

- LMS will develop a customized training plan based on learners chosen pathway which will track completed training and due dates.
- Certificate can be printed or emailed and there will be paper copies.
- Plans to retain three (3) Master Trainers but did not detail why three (3) Master Trainers is a sufficient number of trainers.
- Plans to develop policies to verify prospective trainers meet requirements.
- Proposes to end OQMHP and have it under a PNMI pathway under BHP training.

E. DSP Pathways Training and Certification Program

- Plans to develop a Learner application process.
- Will have the ability to deny applications.
- Plans to develop a policy and procedure for reporting any applicant with false or inaccurate information to OADS and keep a record of reports made.
- LMS will develop a custom training plan based on the DSPs chosen pathway.
- Plans to design the customized DSP pathways plan to do reminders on annual and recertification trainings
- Will make sure DSPs are marked fully expired if they have not met requirements.
- Plans to retain three (3) Master Trainers but did not specify if these are the same Master Trainers tasked to perform BHP Pathways Instructor Training.

F. BHP and DSP Pathways Manuals

- Met the requirements.

G. Customer Service

- Plans to use eSurveyPro via a direct link or QR code to administer surveys that allows for customizable questions.
- Feedback will be used in the adaptation for future training updates.
- Plans to utilize their code of conduct for customer service which is rooted in customer-center approach, timely service, confidentiality, fostering a positive environment for all and inclusivity.
- Provided a narrative detailing how professionalism is central to their mission.

H. Additional Support

- Will have a help desk staffed Monday-Friday 8 a.m. to 5 p.m. and rotating after hours on-call schedule.
- Will respond to all inquiries within 24 hours of receipt.
- Plans to provide an online self-service instructor portal.
- Plans to maintain a database, contact list and email listserv to provide reminders of certification requirements, deadlines and upcoming availability of trainings.

I. Quality Assurance

- Plans to develop and maintain a quality assurance program for the DSP Pathways Program.
- Plans to utilize evidence-based best practices of training development and maintenance of the training.

**STATE OF MAINE
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- Plans to utilize research, statistics, modern scenarios to keep content relevant, ensure accuracy and use current evidence-based practices and principles.
- Proposes a formal instructor onsite visit and semi-annual training observations.
- Plans to utilize training and/or consultations with trainers and instructors to support communication of improvements to training based on system needs.

J. Workforce Development Activities

- Plans to provide monthly presentations about BHP training to eight (8) FEDCAP locations, Adult Ed programs and attend job and career fairs.
- Provide outreach at Maine universities, community colleges, Adult Ed Programs, high schools, vocational programs, career focused agencies, job fairs, career centers and FEDCAP.
- Workforce specialists will follow up with each learner after completion to ask about their plans to use their certification, offer support in connecting learners with agencies that are recruiting and continue to follow up about their success in finding related jobs.
- Plans to provide a BHP Workforce Developer.
- Plans to develop the Enhanced Live Day format for educational partners.
- Ability to create practices to separate learners by type to satisfy future requirements.
- Plans to update the website to include an expanded direct care workforce.
- The website will have case studies, testimonials, career related stores, career pathways information, role of a BHP, positions for a BHP, DSP pathways, role of a DSP, positions for DSPs, how to access Core pathways, BHP and DSP pathways, links to affiliated registration system and LMS.
- Plans to use multi-dimensional targeted digital marketing and social media advertising.
- Plans to use subcontractors for these services.
- Plans to utilize Google analytics, Google ads, Meta advertising and subcontractor to assess marketing efforts and website traffic.

K. Staffing and Staff Qualification

- Provided a detailed response related to appropriate background check and exclusion from federal participation.

M. Records and Reporting

- Met the requirements.

N. Performance Measures

- Did not respond to this section.

O. Reports

- Did not respond to this section.

2. Staffing

- Did not describe how subcontractors would interact with their organization.

3. Implementation - Work Plan

- Met the requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$ 955,102.00	÷	\$ 3,940,755.23	x	25.00 points	=	6.06

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/2/2024, 12/21/2024

EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• Met the requirements

**STATE OF MAINE
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DATE: 12/2/2024, 12/21/2024

EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Center for Learning has 28 years of expertise in managing complex certification and training programs• Bidder claims to have been at the forefront of Behavioral Health training in Maine since 1996.• Over time bidder has expanded its offerings to include a range of key behavioral health certifications• Bidder is a founding member of the Maine Behavioral Health Workforce Development Collaborative (MBHWDC)• 3 projects attached
2. Subcontractors
<ul style="list-style-type: none">• Co-Occurring Collaborative Serving Maine
3. Organizational Chart
<ul style="list-style-type: none">• Attached
4. Litigation
<ul style="list-style-type: none">• Attached
5. Financial Viability
<ul style="list-style-type: none">• Attached
6. Certificate of Insurance
<ul style="list-style-type: none">• Attached

**STATE OF MAINE
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EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Offices located at USM • Bidder will provide administrative functions as required by RFP • Bidder agrees to 3.a through 3.f.
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • Training content divided into micro modules designed for independent navigation and completion at users pace • Offline access will be available through downloadable LMS resources to support learners in areas with limited internet connectivity.
<ul style="list-style-type: none"> • Bidder will use self-paced online lessons and live, interactive sessions • a. 50hrs of training is broken down to 35hrs of online lessons consists of 57 modules & 15hrs of training consisting of 11 live sessions led by instructors • b. Trainings are designed to align with Department approved curriculum and the standards established by Maine College of Direct Support
<ul style="list-style-type: none"> • Attachment 7 attached • Bidder agrees to 3.a through 3.d. • Bidder agrees to 4 & 4.a.
C. Information Technology
<ul style="list-style-type: none"> • Bidder met requirements of RFP
<ul style="list-style-type: none"> • Bidder will develop a modern, user-centric website that works seamlessly across multiple devices. • Bidder agrees to include 2.a – 2.c
<ul style="list-style-type: none"> • Bidder will have dedicated phone line and email address for tech support. • Online helpdesk portal will also be available
<ul style="list-style-type: none"> • Bidder states they comply with IT policies, • N: Refers reader to search Appendix G for responses
<ul style="list-style-type: none"> • Minimal response, • N: Refers reader to search Appendix G for responses
<ul style="list-style-type: none"> • Bidder states they have submitted all required documentation • Bidder agrees
<ul style="list-style-type: none"> • Bidder states they have policies in place already
<ul style="list-style-type: none"> • Bidder states they adhere to National Institute of Standards and Technology IT Security Standards for Identification and Authentication
<ul style="list-style-type: none"> • Bidder agrees

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EVALUATOR DEPARTMENT: DHHS/OCFS

<ul style="list-style-type: none"> • Bidder states they will adhere to Annual Audit requirement. • No mention of providing the Department with a copy of completed audit.
<ul style="list-style-type: none"> • Bidder doesn't back up data every 24hr • No response to 12.a-12.c
<ul style="list-style-type: none"> • Minimal response, Bidder states they will abide by stipulated language for response time
<ul style="list-style-type: none"> • Bidder agrees to limit outages as outlined in RFP
C. Core Pathways
<ul style="list-style-type: none"> • Customized content will address specific participant roles
<ul style="list-style-type: none"> • Core Pathways curriculum establishes foundational skills and knowledge applicable to all learners
<ul style="list-style-type: none"> • Core Pathways will be established as a pre-requisite
D. BHP Pathways Training and Certificate Program
<ul style="list-style-type: none"> • Bidder met minimum requirements
<ul style="list-style-type: none"> • Bidder met minimum requirements
<ul style="list-style-type: none"> • Bidder met minimum requirements
<ul style="list-style-type: none"> • Bidder met minimum requirements
E. DSP Pathways Training and Certification Program
<ul style="list-style-type: none"> • Bidder met minimum requirements
<ul style="list-style-type: none"> • Bidder met minimum requirements
<ul style="list-style-type: none"> • Bidder met minimum requirements
<ul style="list-style-type: none"> • Bidder met minimum requirements
F. BHP and DSP Pathways Manuals
<ul style="list-style-type: none"> • Bidder agreed to G.1.a-d • Manuals will be tailored to meet the unique requirements of each program
G. Customer Service
<ul style="list-style-type: none"> • Bidder agrees to develop and implement Satisfaction surveys, Post training skills assessment and certificate holder preparedness surveys
<ul style="list-style-type: none"> • Bidder responded to H.2 and H.2.a
<ul style="list-style-type: none"> • Bidder proposes establishing structured meetings with State agencies and stakeholders
<ul style="list-style-type: none"> • Professionalism is a foundational element of Center for Learning's policies, procedures, and practice model, influencing interactions with clients & partners
H. Additional Support
<ul style="list-style-type: none"> • Bidder will utilize a dedicated email inbox & voicemail line to collect after hours inquiries

**STATE OF MAINE
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EVALUATOR DEPARTMENT: DHHS/OCFS

<ul style="list-style-type: none"> • Will utilize a tracking system to verify timelines are met & maintain accountability • For complex issues, the participant will be contacted within one business day to acknowledge receipt and provide a time line for resolution
<ul style="list-style-type: none"> • Bidder proposes a dedicated email and phone line for tech support for instructors and their agencies
<ul style="list-style-type: none"> • Bidder agrees to provider outreach and support to agencies.
<ul style="list-style-type: none"> • Bidder proposes a dedicated email and phone line for inquiries and requests
I. Quality Assurance
<ul style="list-style-type: none"> • Bidder states they will implement a structured quality assurance program • Specialized training modules are developed to address identified needs.
J. Workforce Development Activities
<ul style="list-style-type: none"> • Bidder responded to RFP section • Bidder responded to and agreed to all sections
K. Staffing and Staff Qualification
<ul style="list-style-type: none"> • Bidder agreed to ensure staffing include 5yrs experience • During pre-employment screening, candidates must provide an official copy of certification, which is then verified with Maine College of Direct Support • Candidates must provide proof of active license, which is then recorded in a centralized system to maintain compliance • Staff undergo comprehensive background check during pre-employment screening.
M. Records and Reporting
<ul style="list-style-type: none"> • Reports can be scheduled to run monthly, quarterly, or annually as required • All records will be stored in Learning Management System and certification database • Bidder agrees to ensure access for the Department
N. Performance Measures
<ul style="list-style-type: none"> • Bidder agrees to performance measures
O. Reports
<ul style="list-style-type: none"> • Bidder agrees to submit reports as required.
2. Staffing
<ul style="list-style-type: none"> • a. Attached • Bidders staff will establish a clear scope of work, specifying responsibilities, deliverables, timelines, and performance expectations of each subcontractor • c. Attached
3. Implementation - Work Plan

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EVALUATOR DEPARTMENT: DHHS/OCFS

- | |
|--|
| <ul style="list-style-type: none">• Provided detailed workplan |
|--|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 11/27/2024 and 12/2/2024, 12/30/2024

EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health-Children's Behavioral Health

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• 28 years experience• MHRT/C• Workforce Development Training Systems• Maine Behavioral Health Workforce Development Collaborative

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health-Children's Behavioral Health

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Has done Behavioral Health training since 1996• Partners with several agencies and Colleges• Founding member of Maine Behavioral Health Workforce Development Collaborative.
2. Subcontractors
<ul style="list-style-type: none">• One subcontractor with behavioral health training system.
3. Organizational Chart
<ul style="list-style-type: none">• Provided an organizational chart with names and titles.
4. Litigation
<ul style="list-style-type: none">• 3 lawsuits, unsure if they are relevant to the RFP.
5. Financial Viability
<ul style="list-style-type: none">• Provided 3 years of financial statements audited by a CPA.
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided Liability Insurance

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Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Currently serving across the state. • Has on-line learning services in place. • Unsure where current offices are located and how many.
<ul style="list-style-type: none"> • Currently functioning Monday-Friday 8AM-5PM.
<ul style="list-style-type: none"> • 2. Has structure in place. • Current program offers live interactive classes. • Reminders for deadlines.
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • Downloadable LMS resources. • Plan to include different learning preferences such as videos and case studies. • In person and virtual group activities.
<ul style="list-style-type: none"> • Knowledge checks that include multiple choice, short answer and scenario based questions to assess comprehension. • Peer review exercises. • Blended courses that allow instructors to observe and give feedback. • Review committee of experts to ensure quality of training.
<ul style="list-style-type: none"> • Rolling enrollment. • Live days will include evenings, weekends, and traditional hours. • Unsure what the plan is for live day classes in various parts of the state.
<ul style="list-style-type: none"> • Rolling enrollment • 24/7 access to online training modules. • Virtual and in-person instructor-led trainings. • Trainings in the evenings, weekends and business hours. • Real time enrollment tracking to adjust frequency and time of trainings as needed. • In-person training will be rotated in each region based on need. • BHP training will be 35 hours, 12 modules and a 7 hour live instructor led training.
<ul style="list-style-type: none"> • Will use closed captions, transcripts, and screen reader. • Interested in what customizable based on role or skill level would look like.
<ul style="list-style-type: none"> • Will complete updates needed within 30 days of notification. • Will maintain documentation of approved updates. • Trainers will have real time updates through curriculum management system.

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C. Information Technology
<ul style="list-style-type: none"> Detailed plan on using a LMS that is state complainant.
<ul style="list-style-type: none"> Website will work across multiple devices. Interactive calendar.
<ul style="list-style-type: none"> Online help desk portal, phone number and email. After hours support system for urgent matters.
<ul style="list-style-type: none"> Experience complying with MainIT policies and expectations.
<ul style="list-style-type: none"> Has security policy that meets requirements.
<ul style="list-style-type: none"> Submitted relevant information.
<ul style="list-style-type: none"> Experience managing information within SQL.
<ul style="list-style-type: none"> Follows NIST standards. Security policies in place to limit access to systems and equipment. Physical access devices are managed by a supervisor or department head.
<ul style="list-style-type: none"> Follows NIST standards. Users, processes and devices must be authenticated fore access to organization systems. Usernames cannot be reused for a period of time.
<ul style="list-style-type: none"> Acknowledges that data is the property of The Department and will abide by all language in the contract.
<ul style="list-style-type: none"> Will monitor, track and log all sign in information such as failed logins, timestamps, ensure that actions can be traced back to a user. Automatic alerts for audit logging failures. Management of audit logging will only be access by privileged users.
<ul style="list-style-type: none"> Acknowledges to comply with any backup expectations set by The Department.
<ul style="list-style-type: none"> Agrees to abide by any language set by The Department.
<ul style="list-style-type: none"> Outages will be done outside of peak business hours whenever possible. Will submit written notice of detailed maintenance to The Department at least two weeks before. For emergency downtime, The Department will be notified as soon as possible as well as detailed issue, estimated resolution time and potential impact.
C. Core Pathways
<ul style="list-style-type: none"> Self-paced to accommodate schedules. Customized content for professionals, family or self-advocates. Peer mentorship. Port training materials, webinars and community engagement.
<ul style="list-style-type: none"> Case studies across different environments. Trainers can adapt training examples for BHP or DSP.

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<ul style="list-style-type: none"> • Pilot testing with BHPs, DSPs, family and self-advocates.
<ul style="list-style-type: none"> • The LMS will track progress and verify that Core Pathways has been done before participants can register for next pathways.
<p>D. BHP Pathways Training and Certificate Program</p>
<ul style="list-style-type: none"> • Appropriate documentation will be required and tracked.
<ul style="list-style-type: none"> • LMS will flag trainees with provisional certificates. • Certification coordinator will verify completion records before issuing certificates.
<ul style="list-style-type: none"> • Will require proper documentation that requirements are met. • Professional development to ensure consistency in training. • Regular audits will be done to ensure requirements were met.
<ul style="list-style-type: none"> • OQMHP will be reviewed daily. • Certifications given electronically or via mail based on applicants preference. • Automatic reminders to ensure application is processed within the time frame. • Recommendation for competency-based assessment, continued education, supervision and mentorship program.
<p>E. DSP Pathways Training and Certification Program</p>
<ul style="list-style-type: none"> • Will require appropriate documentation and follow all requirements.
<ul style="list-style-type: none"> • Will provide annual and triannual training sessions. • Centralized tracking system will monitor certification status. • Automatic notifications will be sent to DSPs and employer. • Track lapsed or expired certifications in progress toward regaining active status. • Resources and guidance will be provided for DSPs.
<ul style="list-style-type: none"> • Training will be done through workshops, virtual sessions and online modules. • Performance assessments and feedback will be used.
<ul style="list-style-type: none"> • Staff and subcontractors will take training on background check system (including compliance with operational protocols), applicable rules, and data security statutes. • Training will be done for new hires as well as additional training periodically. • All records will be stored in the LMS.
<p>F. BHP and DSP Pathways Manuals</p>
<ul style="list-style-type: none"> • Updates will be distributed to personnel, instructors and agencies through secure digital platform. • Quarterly reviews to ensure content is relevant and updates are documented and submitted to The Department.
<p>G. Customer Service</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health-Children’s Behavioral Health

<ul style="list-style-type: none"> • Survey will look for feedback on training experience, content relevance, trainer effectiveness, participant engagement, and overall satisfaction. • Survey will be analyzed quarterly. • Post training knowledge and skills assessment results will be placed into reports to see strengths and skill gaps for future development. • Tracking system will monitor response rates and prompt follow ups as needed.
<ul style="list-style-type: none"> • Responses to client inquiries expectations are 24 hours for email and 4 hours for urgent calls. • Training includes effective communication, empathy and cultural competency. • Workshops on professionalism, conflict resolution, including de-escalation techniques, boundary setting and reflective practices with quarterly refresher sessions. • Feedback and complaints are documented with structured process for resolutions.
<ul style="list-style-type: none"> • Will do outreach to schools, colleges and universities that include informational sessions, career counseling and collaboration with career advisors. • Have structured meetings scheduled with State departments and stakeholders.
<ul style="list-style-type: none"> • “Professionalism encompasses integrity, accountability, empathy, and respect..” • Policy highlights ethics, confidentiality, accountability and cultural competence.
<p>H. Additional Support</p>
<ul style="list-style-type: none"> • A dedicated email inbox and voicemail, automated responses as receipt of inquiry. • Inquiries are reviewed each morning and categorized by urgency. • Tracking system will verify timelines and maintain accountability. • For complex inquires, participant will be called within one business day and given a timeline for resolution.
<ul style="list-style-type: none"> • Dedicated phone line and email address and an online help desk portal to submit tickets, track progress and access a FAQ. • Real time support during business hours and after hours support for urgent technical issues. • Quarterly refresher workshops for instructors. • Agency IT staff will receive periodic training on the LMS to manage some issue internally.
<ul style="list-style-type: none"> • Conduct needs assessment focusing on certification data, agency size, client demographics and projected training needs. Agencies will be prioritized based on deadlines, volume of services and geographic challenges.

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EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health-Children’s Behavioral Health

<ul style="list-style-type: none"> • Monthly informational webinars with live Q&A, updates on certification deadlines, training requirements and resources. • Agencies will be assigned dedicated support contract for bi-weekly check ins. • Partnership program to facilitate collaboration with certified agencies and non-certified agencies. • Not sure incentive program is appropriate since training is free to agencies.
<ul style="list-style-type: none"> • Inquires will be reviewed within two business days. • Records will be reviewed and document with the person’s name, certification type, modules completed, dates, and standing status, there will be a second review before sent. • If paper copy is requested, it will be sent via certified mail. • Monthly review to ensure the fifteen day requirement is met.
<p>I. Quality Assurance</p>
<ul style="list-style-type: none"> • Learners will be sent reminders of incomplete modules and have access to coaching and technical support. • Surveys on learner satisfaction and training effectiveness. • Research review of evidence based practices.
<ul style="list-style-type: none"> • Regular evaluations to identify system priorities and gaps in knowledge or skills. • Unsure how often evaluations will occur. • Trainers will have access to consultations on enhancing teaching techniques.
<p>J. Workforce Development Activities</p>
<ul style="list-style-type: none"> • Training schedule to align with academic calendar. • Maintain contact with educational partners for support, resolve challenges and ensure effective delivery.
<ul style="list-style-type: none"> • Where will print formats be displayed? Which media platforms will be used? • Video content. • Will use a media marketing company.
<p>K. Staffing and Staff Qualification</p>
<ul style="list-style-type: none"> • Must provide professional references and undergo assessments of communication and instructional skills. • Ongoing professional development. • Feedback will guide professional development.
<ul style="list-style-type: none"> • Will require official copy of certification and it will be verified with Maine College of Direct Support. • Certification status will be tracked and alerts will be issued as expiration dates approach.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 11/27/2024 and 12/2/2024, 12/30/2024

EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health-Children’s Behavioral Health

<ul style="list-style-type: none"> • Annual refreshers and continued education will be part of professional development. • Quarterly audits of certifications.
<ul style="list-style-type: none"> • Proof of license will be cross referenced with licensing board. • There will be a tracking system to monitor expiration dates and send reminders before renewal dates. • Will send reminders for upcoming continued education.
<ul style="list-style-type: none"> • Background checks and federal exclusion screening will be done in the hiring process. • Monitoring system to ensure compliance and rechecks.
<p>M. Records and Reporting</p>
<ul style="list-style-type: none"> • LMS will track progress with reports generated monthly, quarterly and annually. • Reports will show actionable recommendations based on trends and feedback. • Audits to comply with standards.
<ul style="list-style-type: none"> • All trainings records will be stored in the LMS and certification database. • BHP and DSP will track completed modules and certification status. OQMHP will show training sessions attended and progress. • Regular data quality checks to ensure accuracy and reliability of records- unsure how often.
<ul style="list-style-type: none"> • The Department will have a dedicated and secure account on the LMS and certification database. View and download only. • Certification database is updated in real time. • The Department will be able to generate custom reports.
<p>N. Performance Measures</p>
<ul style="list-style-type: none"> • Met the requirements.
<p>O. Reports</p>
<ul style="list-style-type: none"> • Met the requirements.
<p>2. Staffing</p>
<ul style="list-style-type: none"> • a. and c. Provided. • b. Each subcontractor will be designated a staff member. • Weekly or bi-weekly check-ins and to monitor progress. • Subcontractor will need to submit monthly progress reports on completed tasks, challenges and upcoming deliverables. • Will use a project management platform for communication, task tracking and collaboration with subcontracts, consultants, and internal staff. • Monthly and quarterly performance evaluations.
<p>3. Implementation - Work Plan</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 11/27/2024 and 12/2/2024, 12/30/2024

EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health-Children's Behavioral Health

- | |
|---|
| <ul style="list-style-type: none">• a. & b. Provided. |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/2/2024; 12/30/2024; 1/3/2025

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• Bidder has administered the Mental Health Rehabilitation Technician certification for the State of Maine since 1996; additional behavioral health direct support certificates added to portfolio• Project One: demonstrates relevant experience: Administering the MHRT/C Certification Program; 900 applications annually managed end-to-end• Project Two: demonstrates relevant experience: DHHS-OBH Workforce Development Services; creating training systems, managing certifications• Project Three: demonstrates relevant experience: Maine Behavioral Health Workforce Development Collaborative (MBHWDC); issued 2,251 certifications in FY22, Administered LMS and communication channels such as Zoom, newsletters, and website for learners

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/2/2024; 12/30/2024; 1/3/2025

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
	<ul style="list-style-type: none"> • Center for Learning (CFL) is part of the Catherine Cutler Institute at the University of Southern Maine; has access to university’s infrastructure, research capabilities, and faculty expertise • 28 years of managing certification and training programs including Maine’s Mental Health Rehabilitation Technician certification • Has also designed and delivered specialized curricula for Maine’s workforce, training pathways for emerging roles, and creation of hybrid training delivery systems (asynchronous and live elements blended) • Collaborates with federal and state agencies, such as SAMHSA (Substance Abuse and Mental Health Services Administration), Maine DHHS – OBH and OADS, and other academic institutions such as Maine community colleges. • Project One: demonstrates relevant experience: Administering the MHRT/C Certification Program; 900 applications annually managed end-to-end • Project Two: demonstrates relevant experience: DHHS-OBH Workforce Development Services; creating training systems, managing certifications • Project Three: demonstrates relevant experience: Maine Behavioral Health Workforce Development Collaborative (MBHWDC); issued 2,251 certifications in FY22, Administered LMS and communication channels such as Zoom, newsletters, and website for learners
2. Subcontractors	
	<ul style="list-style-type: none"> • Co-Occurring Collaborative Serving Maine (CCSME)
3. Organizational Chart	
	<ul style="list-style-type: none"> • Provided
4. Litigation	
	<ul style="list-style-type: none"> • Provided 3 Complaints/Accusations
5. Financial Viability	
	<ul style="list-style-type: none"> • Single Audit Compliance Reports: Years ending June 30, 2021, 2022, and 2023
6. Certificate of Insurance	
	<ul style="list-style-type: none"> • Provided - valid

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/2/2024; 12/30/2024; 1/3/2025

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Will maintain current office locations • Q: Where are the current offices?
<ul style="list-style-type: none"> • Automated phone and email systems are available outside of operating hours to provide guidance for urgent matters
<ul style="list-style-type: none"> • The learning management system provide automated reminders of upcoming deadlines so ensure learners maintain compliance with requirements • Live training will be conducted virtually and in person and include breakout rooms, real-time polls, and Q&A sessions
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • 1.a.b.c.: met • Training styles to be used include live interactions such as role-playing and scenario-based exercises, visual elements such as infographics and videos, auditory resources such as recorded lectures and discussion groups
<ul style="list-style-type: none"> • Curriculum review committee will include subject matter experts, instructional designers, and program staff • Will use pre- and post-training assessments, feedback from field supervisors, and post-certification surveys to evaluate effectiveness with aim of learner satisfaction rate of 85% or higher and 90% of participants demonstrating skill readiness for their role
<ul style="list-style-type: none"> • A network of qualified trainers will rotate in-person sessions regionally across various time slots
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • Will adhere to a schedule of reviews, including semi-annual reviews with a priority for regulatory changes, evaluation feedback, and emerging industry trends. • Curriculum will be designed with learner needs in mind: closed captions, transcripts, screen reader compatibility, customizable to roles or skill level • A curriculum management system will be utilized to store approved content, track updates, and notify trainers and trainees of changes
<ul style="list-style-type: none"> • Incorporation of new guidelines, competencies, and procedural requirements will be integrated into the curriculum within 30 days of notification.
C. Information Technology
<ul style="list-style-type: none"> • Will use existing Moodle-based LMS currently used by the CFL for Maine MHRT-1, MHRT/C, MHRT/CSP, MHSS, and CIPSS curricula

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

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EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none"> • Website will comply with WCAG to ensure accessibility • Website will use a content management system to allow state staff to make updates without requiring technical expertise
<ul style="list-style-type: none"> • There will be a dedicated phone line and email address, as well as an online help desk portal, for technical support • Will provide a resource library with video tutorials and troubleshooting guides to be available at all times
<ul style="list-style-type: none"> • 4. – 8. Met the requirements
<ul style="list-style-type: none"> • 9. Adheres to National Institute of Standards and Technology (NIST) IT Security Standards for Identification and Authentication
<ul style="list-style-type: none"> • 10. Met the requirements
<ul style="list-style-type: none"> • 11. Met the requirements
<ul style="list-style-type: none"> • Virtual backups are done six or seven days per week
<ul style="list-style-type: none"> • Will abide by stipulated language within the contract
<ul style="list-style-type: none"> • The Department will be notified in writing at least two weeks prior to scheduled maintenance
<p>C. Core Pathways</p>
<ul style="list-style-type: none"> • Customized content to address specific participant roles, such as family members, natural supports, and self-advocates • Peer mentorship will be used to match new participants with experienced BHPs and DSPs for guidance
<ul style="list-style-type: none"> • Thoroughly responded
<ul style="list-style-type: none"> • The LMS and credentialing database will be utilized in tracking progress as well as giving automated notification prompts for incomplete requirements
<p>D. BHP Pathways Training and Certificate Program</p>
<ul style="list-style-type: none"> • Applicants will submit documentation verifying eligibility. The documentation will be tracked in a credentialing database with regular reviews to confirm enrollees meet requirements
<ul style="list-style-type: none"> • Certification coordinator will verify completion record and generate certificates within five business days of verification
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • Recommendations include ongoing supervision and mentorship
<p>E. DSP Pathways Training and Certification Program</p>
<ul style="list-style-type: none"> • 1. Met
<ul style="list-style-type: none"> • 2. Will utilize a tracking system to monitor certification statuses and provide automated notification alerts to DSPs and their agencies of upcoming deadlines

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: University of Maine System action through Univ. of Southern Maine

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EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none"> • 3. The curriculum will focus on DSP Pathways content, adult learning strategies, and instructional methods
<ul style="list-style-type: none"> • 4. Met
F. BHP and DSP Pathways Manuals
<ul style="list-style-type: none"> • Met
G. Customer Service
<ul style="list-style-type: none"> • 1. Satisfaction and preparedness surveys will be distributed via an online platform • Knowledge and skills assessment will be contained within the LMS to be available immediately upon completion of modules
<ul style="list-style-type: none"> • 2. Met
<ul style="list-style-type: none"> • 3. Partnerships will be formalized through Memorandums of Understanding to outline roles, expectations, and shared objectives
<ul style="list-style-type: none"> • 4. Met
H. Additional Support
<ul style="list-style-type: none"> • Triage of after-hours messages will be completed each morning • Onboarding of instructors will include training on the LMS. • They will offer quarterly refresher workshops on new features and best practices.
<ul style="list-style-type: none"> • Will provide each agency with a customized information packet regarding certification steps, deadlines, and resources
<ul style="list-style-type: none"> • Responses will go through a secondary review to ensure accuracy before finalizing a prior certification
I. Quality Assurance
<ul style="list-style-type: none"> • 1. -2. Met
J. Workforce Development Activities
<ul style="list-style-type: none"> • 1. Met
<ul style="list-style-type: none"> • Will use support of a media marketing company – oversight will extend to subcontractors
K. Staffing and Staff Qualification
<ul style="list-style-type: none"> • 1. Met
<ul style="list-style-type: none"> • Will be confirmed during pre-employment screening
<ul style="list-style-type: none"> • 3. Met
<ul style="list-style-type: none"> • Will perform pre-employment checks as well as ongoing monitoring to ensure they maintain eligibility for participation
M. Records and Reporting

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none"> • Reports on training completion rates and certification outcomes will be generated monthly, quarterly, and annually. • Customizable reports can be provided at the Department's request
<ul style="list-style-type: none"> • will be stored in the Learning Management System (LMS) and certification database
<ul style="list-style-type: none"> • Will establish dedicated user accounts for authorized personnel • Ongoing technical support will be provided
N. Performance Measures
<ul style="list-style-type: none"> • No response
O. Reports
<ul style="list-style-type: none"> • No response
2. Staffing
<ul style="list-style-type: none"> • a. Met
<ul style="list-style-type: none"> • A designated staff member will be primary point of contact for each subcontractor
<ul style="list-style-type: none"> • c. Met
3. Implementation - Work Plan
<ul style="list-style-type: none"> • a. Thoroughly described
<ul style="list-style-type: none"> • Met – timeline appears reasonable based upon my experience

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/3/2024, 1/3,2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• They list 3 projects all valid• They have been doing this since 1996 so well within the last five year requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/3/2024, 1/3,2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• 28 years of experience• Leverages the University's academic infrastructure• Provided 3 valid projects
2. Subcontractors
<ul style="list-style-type: none">• Co-Occurring Collaborative Serving Maine – supports grant proposal, training and cert processes
3. Organizational Chart
<ul style="list-style-type: none">• Provided, some are listed as TBD
4. Litigation
<ul style="list-style-type: none">• List 3, negligence, only 1 appears resolved/settled
5. Financial Viability
<ul style="list-style-type: none">• Provided, appear viable
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided, currently valid

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/3/2024, 1/3,2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • They have current office locations across the State. • They provide support via phone and email
<ul style="list-style-type: none"> • Will meet this requirement
<ul style="list-style-type: none"> • Pre-screening checklist • Reporting is integrated • Training is available 24/7 • Live training modules – virtually or in person
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • They will provide online, in person through the existing LMS • Virtual will be interactive with the trainers • Offline access will be available as well for people with limited internet • Will allow learners to select formats that work better for them • Certification success at 80% or higher expected
<ul style="list-style-type: none"> • Multimedia content • Verification at the end – short quizzes, scenario based • QA testing and pilot testing • Aim to achieve 85% or higher satisfaction rate
<ul style="list-style-type: none"> • Will provide monthly calendar outlining live and virtual classes • 35 hours of online and 15 hours of live sessions for DSP training • Utilizes scheduling tools to help facilitate completion
<ul style="list-style-type: none"> • Provided in attachment 7
<ul style="list-style-type: none"> • Will wait for approval • Will adhere to established schedules by department • Will meet requirements for training modules • Will create an implementation plan with department
<ul style="list-style-type: none"> • Will ensure compliance with changing requirements • Will implement updates within 30 days of notification • Quarterly meetings for review • Will create a structured workflow
<ul style="list-style-type: none"> • Provided an outline and criteria for the LMS system • Will ensure it's SCORM compliant
<ul style="list-style-type: none"> • Will develop a website for a central hub for all training • Integrate a CMS for content updating

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

<ul style="list-style-type: none"> • Will provide a, b • Online registration forms will be provided
<ul style="list-style-type: none"> • Dedicated phone line and email for support • SLA and issue resolution process
<ul style="list-style-type: none"> • Will adhere to required policies • Provided appendix G answering specific policies
<ul style="list-style-type: none"> • They currently meet NIST 800-53 Rev 5 requirements
<ul style="list-style-type: none"> • Will meet requirements
<ul style="list-style-type: none"> • Will use sql server db and spreadsheets
<ul style="list-style-type: none"> • They follow NIST standards
<ul style="list-style-type: none"> • They follow NIST standards • They use role based and MFA
<ul style="list-style-type: none"> • They will meet this requirement
<ul style="list-style-type: none"> • Will adhere to the annual audit requirements
<ul style="list-style-type: none"> • They do not address the requirements of this question but state that custom backups can be created
<ul style="list-style-type: none"> • They state they will abide but their current policy does not meet these response times
<ul style="list-style-type: none"> • They will limit planned outages to meet requirements
<p>C. Core Pathways</p>
<ul style="list-style-type: none"> • They will provide • Flexible formats, role specific customization
<ul style="list-style-type: none"> • Will emphasize universal competencies
<ul style="list-style-type: none"> • Will require core pathways as a prerequisite • Will require an assessment with requirements • Will restrict bhp or dsp training until completed
<p>D. BHP Pathways Training and Certificate Program</p>
<ul style="list-style-type: none"> • Will meet requirements
<ul style="list-style-type: none"> • Will meet requirements • Will flag trainees and generate certificates • Will retain for future verification
<ul style="list-style-type: none"> • Will retain master trainers to meet efficient delivery • Will meet required education requirements • Will create a scalable pool of certified instructors
<ul style="list-style-type: none"> • Will meet the required 3 days for verification • Will issue certificates within 5 business days

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

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BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/3/2024, 1/3,2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

<ul style="list-style-type: none"> • 3 day application processing by using a centralized tracking system • Provided recommendations for making the system work better
E. DSP Pathways Training and Certification Program
<ul style="list-style-type: none"> • Will meet these requirements
<ul style="list-style-type: none"> • Will meet all the requirements
<ul style="list-style-type: none"> • Will meet all the requirements
<ul style="list-style-type: none"> • Will adhere to strict policies • The LMS system will document all essential details • All records will be maintained for all certifications
F. BHP and DSP Pathways Manuals
<ul style="list-style-type: none"> • Manuals will be created • They will meet requirements • Quarterly reviews
G. Customer Service
<ul style="list-style-type: none"> • Will develop all surveys and submit when required
<ul style="list-style-type: none"> • Client centered approach • Outlined all their training and policies
<ul style="list-style-type: none"> • Will meet all of these requirements and collaborative relationships • They provided a full narrative and understanding of professionalism
H. Additional Support
<ul style="list-style-type: none"> • Will meet requirement
<ul style="list-style-type: none"> • Will meet requirement
<ul style="list-style-type: none"> • Will conduct a needs assessment for agencies • <u>will meet requirements</u>
<ul style="list-style-type: none"> • Dedicated channels for verification requests • Will meet all requirements
I. Quality Assurance
<ul style="list-style-type: none"> • Will implement a qa program • Adhere to ADA requirements • Create implementation plans
<ul style="list-style-type: none"> • will conduct regular evaluations to identify system priorities • will meet requirements • specialized training modules based on need
J. Workforce Development Activities
<ul style="list-style-type: none"> • Will hire a BHP workforce developer • will do outreach programs • will meet all of the requirements requested

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: University of Maine System action through Univ. of Southern Maine

DATE: 12/3/2024, 1/3,2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

<ul style="list-style-type: none"> • Will create a website and awareness campaign • Will conduct evaluations and gather demographic, website traffic to refine • Will meet all requirements on reporting and ongoing improvements
K. Staffing and Staff Qualification
<ul style="list-style-type: none"> • Will meet the staffing requirements • Will meet MaineCare standards • Will cross reference and meet this requirement • Will do all background checks and federal exclusion screenings
M. Records and Reporting
<ul style="list-style-type: none"> • Will meet all reporting requirements • Will track and maintain all necessary records for training • Will meet this requirement
N. Performance Measures
<ul style="list-style-type: none"> • Will meet this requirement
O. Reports
<ul style="list-style-type: none"> • Will meet this requirement
2. Staffing
<ul style="list-style-type: none"> • Provided in attachment 8 • None provided • Provided staffing but only percentage of time not a real time allocation
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided, in detail, plus chart and when tasks will be carried out • Provided, meets requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: Woodfords Family Services

DATE: 12/3/2024, 12/22/24

EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• Met the requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: Woodfords Family Services

DATE: 12/3/2024, 12/22/24

EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Non-Profit organization committed to the support & inclusion of people with special needs & their families in Maine communities• Founded in 1967• Bidder operates a statewide Training Resource Center (TRC) that develops, designs, and delivers a robust catalog of trainings• Bidder has maintained accreditation by the Council of Accreditation (COA) since 2008• Projects attached
2. Subcontractors
<ul style="list-style-type: none">• Bidder listed subcontractors to be used
3. Organizational Chart
<ul style="list-style-type: none">• Attached – Bidder met requirements
4. Litigation
<ul style="list-style-type: none">• Attached – Bidder met requirements
5. Financial Viability
<ul style="list-style-type: none">• Attached – Bidder met requirements
6. Certificate of Insurance
<ul style="list-style-type: none">• Attached – Bidder met requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: Woodfords Family Services

DATE: 12/3/2024, 12/22/24

EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Bidder maintains office in Westbrook, also has access to agency owned and non-agency owned training facilities throughout the state.
<ul style="list-style-type: none"> • Bidder provides administrative functions during required days and times
<ul style="list-style-type: none"> • Bidder agrees to provide learner administration listed above
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • Blended training will consist of both asynchronous online lessons and live instruction offered both in person and virtually throughout the state
<ul style="list-style-type: none"> • Bidder will develop and continually adapt a flexible schedule that easily accommodates outcomes regarding needs as well as demands for face to face training
<ul style="list-style-type: none"> • 2.a. Bidder proposes 28hrs of online training and 10.5hrs of live training to satisfy the live training requirements
<ul style="list-style-type: none"> • Schedule Attached
<ul style="list-style-type: none"> • Bidder will develop, implement, revise, and update curriculum as needed
<ul style="list-style-type: none"> • Bidder agrees to develop and revise curriculum and training procedures as needed
C. Information Technology
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
<ul style="list-style-type: none"> • Bidder will rebrand an existing website to develop a stand alone site for DCP Pathways Trainings & Certification Program
<ul style="list-style-type: none"> • Bidder agrees to 2.a – 2.c.
<ul style="list-style-type: none"> • Bidder will maintain an email address and phone number specific to the program, which will be monitored to address tech support on nights and weekends
<ul style="list-style-type: none"> • Bidder responded to all sections
<ul style="list-style-type: none"> • Bidder responded to each section individually
<ul style="list-style-type: none"> • Bidder agrees to submit any required or requested information
<ul style="list-style-type: none"> • Bidder utilizes an SQL server database which includes historical data.
<ul style="list-style-type: none"> • Bidder states all files are stored in secure environment and currently has policies and procedures for access
<ul style="list-style-type: none"> • Bidder states they use strong identification and authentication mechanisms
<ul style="list-style-type: none"> • Bidder agrees
<ul style="list-style-type: none"> • Bidder states they will adhere to annual audit requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: Woodfords Family Services

DATE: 12/3/2024, 12/22/24

EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

<ul style="list-style-type: none"> • Bidder agrees to abide by the backup requirements in RFP
<ul style="list-style-type: none"> • Bidder met minimum requirements
<ul style="list-style-type: none"> • Bidder agrees to limit outages during business hours as requested in RFP
C. Core Pathways
<ul style="list-style-type: none"> • Bidder agrees to provide training
<ul style="list-style-type: none"> • Bidder will develop a training that consists of 28hrs online content and 10.5hrs of live learning that addresses common foundational knowledge
<ul style="list-style-type: none"> • Bidders system will make Core Pathways a pre-requisite
D. BHP Pathways Training and Certificate Program
<ul style="list-style-type: none"> • Bidder uses Education, Training, Employment, & Documentation form to verify age and education standards
<ul style="list-style-type: none"> • No response to 2.a.ii
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
E. DSP Pathways Training and Certification Program
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
<ul style="list-style-type: none"> • Bidder responded to all sections
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
F. BHP and DSP Pathways Manuals
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
G. Customer Service
<ul style="list-style-type: none"> • Bidder proposes using ESurveyPro to administer surveys
<ul style="list-style-type: none"> • Bidder will develop standards specific to DCP Pathways Training & Certification.
<ul style="list-style-type: none"> • a. Bidder currently has a customer service & professionalism policy
<ul style="list-style-type: none"> • Bidder states they currently maintain collaborative relationships with state departments, schools, & state contracted providers
<ul style="list-style-type: none"> • Bidder states professionalism is central to their mission of providing high quality services
H. Additional Support
<ul style="list-style-type: none"> • Bidder agrees to respond to after hours inquiries within 24 hrs
<ul style="list-style-type: none"> • Bidder met minimum requirements of RFP
<ul style="list-style-type: none"> • Bidder agrees to provide outreach & support to agencies without a certified instructor
<ul style="list-style-type: none"> • Bidder agrees to process inquiries and requests within 15 days
I. Quality Assurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 12/3/2024, 12/22/24

EVALUATOR NAME: Daniel Dresser

EVALUATOR DEPARTMENT: DHHS/OCFS

<ul style="list-style-type: none"> Bidder states they will develop and maintain a quality assurance program for the DCP Pathways Program
<ul style="list-style-type: none"> Bidder agrees to design and execute training or consultation in response to identified system needs
J. Workforce Development Activities
<ul style="list-style-type: none"> a. Bidder currently employs Maine’s only BHP workforce development specialist 1.b-1.I Bidder responded to RFP section
<ul style="list-style-type: none"> Bidder agrees to all sections in K.2.
K. Staffing and Staff Qualification
Describe in detail how the Bidder will:
<ul style="list-style-type: none"> Bidder agrees to RFP requirements
<ul style="list-style-type: none"> Bidder agrees to RFP requirements
<ul style="list-style-type: none"> Verification of current credentials is part of agencies ongoing Quality Improvement and annual performance evaluation processes
<ul style="list-style-type: none"> Bidder gives a detailed explanation of background check policy
M. Records and Reporting
<ul style="list-style-type: none"> Bidder currently runs and will continue to run quarterly reports
<ul style="list-style-type: none"> Bidder agrees to maintain records database
<ul style="list-style-type: none"> Bidder agrees
N. Performance Measures
<ul style="list-style-type: none"> Missing response
O. Reports
<ul style="list-style-type: none"> Missing response
2. Staffing
<ul style="list-style-type: none"> a. Attached
<ul style="list-style-type: none"> Subcontractors/consultants will be overseen by bidder’s designated program manager
<ul style="list-style-type: none"> c. Attached
3. Implementation - Work Plan
<ul style="list-style-type: none"> a. Attached
<ul style="list-style-type: none"> b. Attached

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: Woodfords Family Services

DATE: 11/28/2024, 12/3/2024, 1/2/2025

EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health, Children’s Behavioral Health

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• 15 years training experience• DSP Trainer the Trainer• BHP Trainer the Trainer• Home and Community Based Services Innovations Grant

**STATE OF MAINE
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EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health, Children’s Behavioral Health

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none">• P- Working with children with Developmental Disabilities since 1967.• P- Provides services as well as trainings.• Offers 25 different trainings.• Experience working with people from diverse cultural backgrounds.
2. Subcontractors	<ul style="list-style-type: none">• Will use a subcontractor for their website, BHP training LMS, accounting, marketing videography, marketing, DSP training LMS
3. Organizational Chart	<ul style="list-style-type: none">• Provided an organizational chart with names and titles.
4. Litigation	<ul style="list-style-type: none">• 1 lawsuit “dismissed with settlement”
5. Financial Viability	<ul style="list-style-type: none">• Provided 3 years of financial statements audited by a CPA.
6. Certificate of Insurance	<ul style="list-style-type: none">• Provided Liability insurance.

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Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Has locations in Kennebec, Westbrook, and soon in Manchester, and shared spaces in Waterville, Bangor and Presque Isle.
<ul style="list-style-type: none"> • Administrative hours are Monday-Friday 8AM-5PM and remote functions 24/7 and on call technician for customer support.
<ul style="list-style-type: none"> • Has a plan determining eligibility. • Has a LMS to assign, track trainings and certifications and re-certifications. • LMS will pre-populate appropriate trainings for learners. • Will use live module training and live trainings.
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • Will use evidenced based combination on learning styles and techniques such as discussions, group activities, gamification, fill-in workbooks, self-reflective exercises and videos and others. • Will have interactive elements every 7-10 minutes. • Release new training program in phases.
<ul style="list-style-type: none"> • Training will have audio, video, graphics, text and closed captioning. • Training will use learner interactions and knowledge checks before, during and after modules. • Quizzes need a score of at least 80% to pass.
<ul style="list-style-type: none"> • Will adapt training schedule based on need. • Provided a diagram of possible training structure.
<ul style="list-style-type: none"> • Core Pathways training will be 28 hours of online training and 10.5 hours of live training. 14 hours of online training and 6.5 hours of live training for provisional and 14 more hours of online training and 4 hours of live training for full certification. • Provided potential training topics for each pathway fundamental training.
<ul style="list-style-type: none"> • Provided proposed training topics and implementation schedule.
<ul style="list-style-type: none"> • Agency has concerns regarding differences in current MaineCare and State rules for training for BHP and DSP. • Will work with The Department to make a plan to align with all MaineCare and Sate rules. • Provided a chart highlighting the differences in certifications.
C. Information Technology

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INDIVIDUAL EVALUATION NOTES**

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<ul style="list-style-type: none"> • Uses sub-contractor Relias Learning Management System. • May look at other subcontractors to accommodate the increase in learners. • Has a plan for selecting a new subcontractor if needed and making sure content is transferred smoothly.
<ul style="list-style-type: none"> • Has a current website in place for BHP training that will be updated to add DSP. • Website has access to manuals and forms for instructors, public forms such as enrollment forms, certification look up for online or printable use. Training calendars, FAQ and learner resources. Submission of contact forms, on-demand technical assistance, trouble shooting, customer services for leaners, training admin and instructors. Marketing and promotional materials, BHP testimonials, case studies, career pathways and links to affiliated websites.
<ul style="list-style-type: none"> • Will have self-services, automated and AI enhanced technology support. • Will have self-services password reset, automated customer char bot, FAQ page, how to videos. • Will have an email address and phone number for technical needs Monday-Friday 8AM-5PM and on-call line monitored by rotation of staff.
<ul style="list-style-type: none"> • Plan to comply with all requirements.
<ul style="list-style-type: none"> • Access to locations with sensitive information is restricted. • Regular training for employees about cybersecurity. • User activities and system changes are monitored and tracked. • Tests contingency plans in the event of disruption. • Multi-factor authentication for accessing systems.
<ul style="list-style-type: none"> • Will ensure they remain in compliance with all required policies.
<ul style="list-style-type: none"> • Currently uses a SQL database.
<ul style="list-style-type: none"> • Maintains files in secure, locked and permission only environment that is accessed only by those who need it for their role.
<ul style="list-style-type: none"> • Multi-factor authentication is used.
<ul style="list-style-type: none"> • Will comply.
<ul style="list-style-type: none"> • Has begun having conversations with a vendor who performs SSAE-18 DOC Type 2 annual audits.
<ul style="list-style-type: none"> • Uses local hyper converged backups, local off-site backups and cloud based disaster recovery backups. • Collects hourly backups that overwrite every 10 hours, nightly backups that are stored for 1 week, monthly backups that are stored for one year and annual back ups that are stored indefinitely.

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<ul style="list-style-type: none"> • Will comply.
<ul style="list-style-type: none"> • Planned outages are usually Wednesday between 5PM-7PM once a month. • Any downtime will be planned with The Department.
<p>C. Core Pathways</p>
<ul style="list-style-type: none"> • Will maintain a distinct tracking system for non-provider agency affiliated learners.
<ul style="list-style-type: none"> • Will comply.
<ul style="list-style-type: none"> • LMS will have a customized training plan for learners and ensure that learners complete the Pathway training before moving forward. • All BHP and DSP pathway certifications will be searchable in the LMS database.
<p>D. BHP Pathways Training and Certificate Program</p>
<ul style="list-style-type: none"> • Has a form to determine if learners meet eligibility requirements. • Will track training completions in the LMS.
<ul style="list-style-type: none"> • LMS will develop a customized training plan based on learners chosen pathway which will track completed trainings and due dates. • Certificate can be printed or emailed and there will be paper copies.
<ul style="list-style-type: none"> • Will have 3 Master trainers. • Will develop policies and procedures on verifying experience and qualifications.
<ul style="list-style-type: none"> • Currently providing the OQMHP program and complying with requirements. • Proposal to end OQMHP and have it under a PNMI pathway under BHP training.
<p>E. DSP Pathways Training and Certification Program</p>
<ul style="list-style-type: none"> • Will comply with requirements and will develop a policy and procedure for reporting any applicant with false or inaccurate information to OADS and keep a record of reports made. • The LMS will develop a custom training plan based on the DSPs chosen pathway.
<ul style="list-style-type: none"> • The LMS will assign DSP continued education training and reminders. • Those with full expired certifications will be removed from the LMS to save cost and will be documented in the learner database as needing full recertification.
<ul style="list-style-type: none"> • Will have 3 agency DSP master trainers.
<ul style="list-style-type: none"> • Will maintain a database with all required information. • LMS will track learners completion of trainings.
<p>F. BHP and DSP Pathways Manuals</p>
<ul style="list-style-type: none"> • Currently has a BHP policies and procedures manual for BHP training.

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<ul style="list-style-type: none"> • Will work to develop a DSP manual.
<p>G. Customer Service</p>
<ul style="list-style-type: none"> • Will develop a satisfaction survey for post-training knowledge and skills assessments, preparedness surveys issued at 6 and 12 month intervals. • Will use eSurveyPro to administer surveys that allows for custom questions. • Feedback will be used in the adaptation for future training updates.
<ul style="list-style-type: none"> • Current policy includes respect, dignity, clear communication, professionalism in behavior, responsiveness and accountability, collaboration and teamwork, problem resolution and on-going training and professional development. • Customer service is rooted in customer-center approach, timely service, confidentiality, foster a positive environment for all and inclusivity.
<ul style="list-style-type: none"> • Has current relationship with OCFS, OADS, LMS, schools, other agencies and state contractors through other contracts.
<ul style="list-style-type: none"> • Has formal policies and procedures that guide actions and expectations of staff, which include communication, ethical standards, and collaboration and teamwork. • Agency believes that inclusion of professionalism ensures consistency in service delivery, collaboration with departments, continuous improvement, respect and trust, adherence to shared goals, conflict resolution and accountability.
<p>H. Additional Support</p>
<ul style="list-style-type: none"> • Will use technology on the training website • A help desk staffed Monday-Friday 8AM-5PM and rotation of after hours on call schedule.
<ul style="list-style-type: none"> • Online self-service instructor portal • Operation of administrative help desk • Rotational on call schedule.
<ul style="list-style-type: none"> • Will maintain a database, contact list and email list serve to provide reminders of certification requirements, deadlines and upcoming availability of trainings.
<ul style="list-style-type: none"> • Will comply.
<p>I. Quality Assurance</p>
<ul style="list-style-type: none"> • Will use evidence based best practices of training development and maintenance of the training. • Will use research, statistics, modern scenarios to keep content relevant, ensure accuracy and use current evidence based practices and principles.
<ul style="list-style-type: none"> • Will use trainings and/or consultations with trainers and instructors to support communication of improvements to training based on system needs.

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EVALUATOR NAME: Chelsea Barry

EVALUATOR DEPARTMENT: Office of Behavioral Health, Children’s Behavioral Health

<ul style="list-style-type: none"> Proposes an implementation of a formal instructor site visit and evaluation that includes observation and evaluations.
<p>J. Workforce Development Activities</p> <ul style="list-style-type: none"> Has a current BHP workforce development specialist. Will continue to provide monthly presentations about BHP training to 8 FEDCAP locations, Adult Ed programs and attend job and career fairs. Has enrolled 1,633 workforce learners between July 2020-September 2024. Does outreach at Maine Universities, Community Colleges, Adult Ed Programs, High schools, Vocational Programs, Career oriented agencies, job fairs, career centers and FEDCAP. Workforce specialist follows up with each learner after completion to ask about their plans to use their certification, offer support in connecting learners with agencies that are recruiting and continues to follow up about their success in finding related jobs. Enhanced live day includes 2.5 hours training on Ethical Considerations, done virtually on weekdays and weeknights. Agency is open to increasing frequency and time of training. Schedule accommodations for high school seniors. Enrollments are on a rolling basis. Live days are offered in full day, half day, multi-day, nights, weekends, mornings etc.
<ul style="list-style-type: none"> Will update the website to include expanded direct care workforce. Website will have case studies, testimonials, career related stores, career pathways information, role of a BHP, positions for a BHP, DSP pathways, role of a DSP, positions for DSPs, how to access Core pathways, BHP and DSP pathways, links to affiliated registration system and LMS. Use multi-dimensional targeted digital marketing and social media advertising. Will use subcontractor Greenlight and Feathr. Will use Google analytics, Google ads, Meta advertising and Feathr to assess marketing efforts and website traffic.
<p>K. Staffing and Staff Qualification</p> <ul style="list-style-type: none"> Will comply. Will comply. Credentials are reviewed at annual performance evaluation. Background checks are done on all employees that includes, state and federal background check, OCFS, APS, BMV, and checks in any state the candidate has lived in in the past 7 years.

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<ul style="list-style-type: none"> • Fingerprinting as needed. • Candidates will be told of any findings and given time to dispute or provide context. • Agency does re-checks as deemed necessary. Unsure how often re-checks are done or what would prompt it.
M. Records and Reporting
<ul style="list-style-type: none"> • Quarterly reports on the number of learners and training completions from the LMS are done. • Satisfaction survey results are reported quarterly. Quality assurance reports are done monthly and reviewed as a team.
<ul style="list-style-type: none"> • Will track BHP first and last name, last four digits of their social security number, date of birth, employer and effective date. • Will take direction from the state of tracking information needed for DSPs. • Will track OQMHP with first and last name, employer, date of hire date, effective date and degree if applicable.
<ul style="list-style-type: none"> • Will report information to the Department as needed, including access to the database.
N. Performance Measures
<ul style="list-style-type: none"> • Met the requirements.
O. Reports
<ul style="list-style-type: none"> • Met the requirements.
2. Staffing
<ul style="list-style-type: none"> • a. & c. Provided. • b. Subcontractors and/or consultants will be overseen by designated program manager.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided. • Provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: Woodfords Family Services

DATE: 12/2/2024, 1/3/2025

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• Bidder has administered Behavioral Health Professional training and certification for the State of Maine since 2012 (through present) totaling 44,646 certifications statewide• Project One: demonstrates relevant experience: Train-the-trainer curriculum development, delivery, and administration• Project Two: demonstrates relevant experience: Administration of Behavioral Health Professional training and certification for the State of Maine• Project Three: demonstrates relevant experience: Design and development of HCBS training for DSPs via Innovation Grant with OADS (relevant subject matter expertise)

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EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Nonprofit organization founded in 1967 with a variety of clinical, educational, behavioral health, family, and community support programs statewide• Training and Resource Center (TRC), operating for over 15 years, offers 18 different trainings and 8 certifications to 2,000 individuals annually• Has been accredited with the Council on Accreditation (COA) since 2008• Project One: Train-the-Trainer Curriculum and Delivery• Project Two: Behavioral Health Professional Training & Certificate Program & Workforce Development Efforts• Project Three: Home and Community Based Services Innovations Grant
2. Subcontractors
<ul style="list-style-type: none">• GreenLight Websites, Relias, Baker Newman Noyes, Stoop Kid Pictures, Feathr marketing platform, Elsevier
3. Organizational Chart
<ul style="list-style-type: none">• Provided
4. Litigation
<ul style="list-style-type: none">• Once case – dismissed and settled
5. Financial Viability
<ul style="list-style-type: none">• Financial Statements June 30, 2021; June 30, 2022; June 30, 2023
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided – valid/effective

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EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Current locations include Westbrook, Kennebunk, Manchester, Waterville, Bangor, Presque Isle, in conjunction with capacity for mobile technology • Program is called “Direct Care Professional (DCP) Pathways Training & Certification Program”
<ul style="list-style-type: none"> • Will provide extended hours 24/7 through self-service, automated, and AI customer service, as well as an on-call technician as needed
<ul style="list-style-type: none"> • Will also promote live training opportunities through outreach efforts and marketing initiatives
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • Interactive elements will be used every 7-10 minutes during online and live content delivery • Training styles include: discussion, group activities, gamification, quizzes, workbooks, self-reflection, videos, and job aids
<ul style="list-style-type: none"> • Will use best practice principles of instructional design as well as adult learning
<ul style="list-style-type: none"> • will develop and continually adapt a flexible training schedule
<ul style="list-style-type: none"> • Met – includes evening and weekend hours available for live training sessions
<ul style="list-style-type: none"> • will work with the Department to ensure that updates are approved prior to implementation and are implemented on a pre-determined schedule.
<ul style="list-style-type: none"> • Will work with the Department to address the variety of differences between the ongoing certifications
C. Information Technology
<ul style="list-style-type: none"> • Currently utilizes Relias learning management system (15 year relationship)
<ul style="list-style-type: none"> • Will use and rebrand current website – is a known resource for many learners and trainers statewide for BHP
<ul style="list-style-type: none"> • 3. - 14. Met
C. Core Pathways
<ul style="list-style-type: none"> • Will maintain a distinct tracking system for non-provider agency affiliated Learners
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • LMS will be used for tracking and automatic assignment based upon completions
D. BHP Pathways Training and Certificate Program
<ul style="list-style-type: none"> • All requisites will be collected and tracked in the LMS

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EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none"> • PDF certificates will be distributed via email, while the paper certificate system will be developed with the Department
<ul style="list-style-type: none"> • Plans to retain 3 master trainers
<ul style="list-style-type: none"> • Proposes sun setting OQMHP program and transition to incorporation of a pathway will enable agencies more direct oversight and supervision of application status, validity of training completion, and proof of continued education
E. DSP Pathways Training and Certification Program
<ul style="list-style-type: none"> • Will develop a process for verifying employment before enrollment
<ul style="list-style-type: none"> • Will use LMS to manage continuing education tracking and reminders
<ul style="list-style-type: none"> • Will retain 3 master trainers on staff, in addition to providing initial and ongoing training
<ul style="list-style-type: none"> • 4. Met
F. BHP and DSP Pathways Manuals
<ul style="list-style-type: none"> • 1. Met
G. Customer Service
<ul style="list-style-type: none"> • Proposes use of eSurveyPro to administer learner surveys via a direct link or QR code
<ul style="list-style-type: none"> • 2. - 3. Met
<ul style="list-style-type: none"> • Met
H. Additional Support
<ul style="list-style-type: none"> • Will respond to all inquiries within 24 hours of receipt
<ul style="list-style-type: none"> • 2. – 4. Met
I. Quality Assurance
<ul style="list-style-type: none"> • Met
<ul style="list-style-type: none"> • Proposes a formal instructor site visit and semi-annual training observations
J. Workforce Development Activities
<ul style="list-style-type: none"> • Currently employs BHP Workforce Development Specialist, who has worked in his capacity since July 2020
<ul style="list-style-type: none"> • Will assess marketing efforts via Google Analytics, Google Ads, Meta Advertising, and Feathr
K. Staffing and Staff Qualification
<ul style="list-style-type: none"> • 1. – 3. Met
<ul style="list-style-type: none"> • Sample procedure described
M. Records and Reporting
<ul style="list-style-type: none"> • 1. – 3. Met
N. Performance Measures

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: Woodfords Family Services

DATE: 12/2/2024, 1/3/2025

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• No response
O. Reports
<ul style="list-style-type: none">• No response
2. Staffing
<ul style="list-style-type: none">• a. Provided
<ul style="list-style-type: none">• There will be a designated program manager overseeing each subcontractor or consultant
<ul style="list-style-type: none">• c. Provided
3. Implementation - Work Plan
<ul style="list-style-type: none">• a. Provided with thorough details
<ul style="list-style-type: none">• b. Provided with thorough details

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: WoodFords Family Services

DATE: 12/3/2024, 1/3/2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

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

Individual Evaluator Comments:

Part I. Preliminary Information
Eligibility Requirements
<ul style="list-style-type: none">• They have 15 years training adult learners• All 3 projects listed meet the requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: WoodFords Family Services

DATE: 12/3/2024, 1/3/2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none"> • Founded in 1967 • Operate a Statewide Training and Resource Center • 2024 offered 348 live courses to 2129 adult learners • Council on Accreditation (COA) certification • Provided 3 valid projects 	
2. Subcontractors	
<ul style="list-style-type: none"> • GreenLight Websites – create customized websites • Relias – Provides the LMS for the BHP Training and certificate program • Baker Newman Noyes, LLC – accounting, soc2 completer • Stoop Kid Pictures -videography provider • Feathr – digital experience, surveys, social media • Elsevier – information and analytics 	
3. Organizational Chart	
<ul style="list-style-type: none"> • Provided 	
4. Litigation	
<ul style="list-style-type: none"> • 1 – claim of negligence, dismissed with settlement 	
5. Financial Viability	
<ul style="list-style-type: none"> • Provided 3 years of financial statements, met requirement 	
6. Certificate of Insurance	
<ul style="list-style-type: none"> • Provided, valid 	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

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BIDDER NAME: WoodFords Family Services

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EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Facility Standards and Requirements
<ul style="list-style-type: none"> • Dedicated TRC in Westbrook, other agency and non agency training facilities
<ul style="list-style-type: none"> • 2. Will meet requirements • Will provide 24/7 remote admin functions and after hours technician
<ul style="list-style-type: none"> • 3. Will meet these requirements
B. General Curriculum and Training Requirements
<ul style="list-style-type: none"> • Will offer virtual and in person training • Multi-year phased transition plan for DCP pathways training and certification • Provided phases in detail of the different programs and plans
<ul style="list-style-type: none"> • Will provide audio, video, graphics and text • Will require comprehension checks every 7 to 10 min
<ul style="list-style-type: none"> • Will require 28 hours of online training and 10.5 hours of live – for core training? • Will meet or exceed the current 50 hour training requirement
<ul style="list-style-type: none"> • Provided in attachment 7 • Provided specifics for a flexible training schedule
<ul style="list-style-type: none"> • Will create pathways for training modules • Outlined the different ones for the pathways
<ul style="list-style-type: none"> • Will work with the department to develop and revise curriculum • Outlined in detail the differences between the BHP and DSP qualifications
C. Information Technology
<ul style="list-style-type: none"> • They will utilize subcontractor Relias for the LMS • Mentions contracting with a different LMS program/provider
<ul style="list-style-type: none"> • Will rebrand the existing website • Will create a one stop shop
<ul style="list-style-type: none"> • Will provide self service, automated and use AI enhanced technology? • Will use tech support provided by the selected LMS vendor?
<ul style="list-style-type: none"> • Will comply and meet requirements
<ul style="list-style-type: none"> • Will meet the NIST 800-53 Rev 5 security requirements
<ul style="list-style-type: none"> • Will provide requested documentation
<ul style="list-style-type: none"> • Use a sql server db and O365 and powershell/spreadsheets
<ul style="list-style-type: none"> • Uses comprehensive policies and procedures • No mention of encryption – only tiered access

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

<ul style="list-style-type: none"> • They will meet this requirement
<ul style="list-style-type: none"> • Will provide the data as necessary
<ul style="list-style-type: none"> • They will meet this requirement • They have a vendor that has done these audits for 20 years
<ul style="list-style-type: none"> • They meet all of these requirements • They currently have 3 types of backups
<ul style="list-style-type: none"> • Will ensure they meet these requirements and levels of response
<ul style="list-style-type: none"> • They will comply and updates are done after hours
<p>C. Core Pathways</p>
<ul style="list-style-type: none"> • They will implement a system for handling this • Will maintain a separate tracking system for non-provider agency learners
<ul style="list-style-type: none"> • Will develop a core pathways
<ul style="list-style-type: none"> • Will utilize the training plan in the LMS • Will track issuance of all certificates
<p>D. BHP Pathways Training and Certificate Program</p>
<ul style="list-style-type: none"> • Will use the ETED form to verify details • Will enroll seniors participating in vocational programs with departments permission
<ul style="list-style-type: none"> • They will develop customized training plans • Will ensure they will meet the BHP pathways • Will develop a system for paper copies
<ul style="list-style-type: none"> • Will retain 3 master trainers • Will develop policies to verify prospective trainers meet requirements
<ul style="list-style-type: none"> • They appear to process within 24 hours • Want to replace the current OQMHP certification process with the development of a PNMI specific BHP pathways training cert • Will give agencies more direct oversight and supervision
<p>E. DSP Pathways Training and Certification Program</p>
<ul style="list-style-type: none"> • Will develop a Learner application process • Will be able to deny applications through the process • Repeated about creating forms for paper copies
<ul style="list-style-type: none"> • Will design the customized DSP pathways plan to do reminders on annual and recertification trainings • Will make sure they are marked full expired if they have not met requirements
<ul style="list-style-type: none"> • Will provide training and meet requirements
<ul style="list-style-type: none"> • Will ensure staff comply with confidentiality requirements • Will create db to retain all info

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202406113

RFP TITLE: Professional Training and Certification Services

BIDDER NAME: WoodFords Family Services

DATE: 12/3/2024, 1/3/2025

EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

<ul style="list-style-type: none"> • Will track certificates through LMS tracking • Will maintain records through LMS tracking
F. BHP and DSP Pathways Manuals
<ul style="list-style-type: none"> • Will create two training operations manuals within 60 calendar days • Manuals will include policies and procedures • Will keep up to date and approved by Department
G. Customer Service
<ul style="list-style-type: none"> • Will meet this requirement • They use eSurveyPro to administer surveys
<ul style="list-style-type: none"> • Will develop standards for employee professionalism • They have their own code of conduct for customer service
<ul style="list-style-type: none"> • They have maintained long relationships with OCFS and OADS, as well as other schools and agencies
<ul style="list-style-type: none"> • Provided narrative – explained professionalism being central to their mission
H. Additional Support
<ul style="list-style-type: none"> • Will respond to all after hour inquiries within 24 hours of their receipt
<ul style="list-style-type: none"> • Will provide support and meet this requirement
<ul style="list-style-type: none"> • Will maintain a database and contact list for agencies that do not have certified instructors
<ul style="list-style-type: none"> • Will meet this requirement
I. Quality Assurance
<ul style="list-style-type: none"> • Will develop and maintain a quality assurance program • Will work to modify and strengthen developed programs
<ul style="list-style-type: none"> • Propose a formal instructor site visit and evaluation procedure
J. Workforce Development Activities
<ul style="list-style-type: none"> • They have the BHP workforce development specialist • Will continue to develop outreach programs • Developed the Enhanced Live Day format for educational partners • Could create practices to separate learners by type if desired
<ul style="list-style-type: none"> • Will build upon the Become a BHP current website and trainings • Continue to build out and maintain everything • Will work with Greenlight websites – subcontractor
K. Staffing and Staff Qualification
<ul style="list-style-type: none"> • Will meet requirements • Provided attachment 8 for job descriptions
<ul style="list-style-type: none"> • Will require all trainers to provide proof of certifications and will track in the LMS

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Melanie Messina

EVALUATOR DEPARTMENT: ALM Team - DHHS

<ul style="list-style-type: none"> • Will ensure staff are in good standing
<ul style="list-style-type: none"> • Will meet this requirement • Background checks will be performed plus rechecks
M. Records and Reporting
<ul style="list-style-type: none"> • They run quarterly reports • Will develop a QA program – appendix H
<ul style="list-style-type: none"> • Will maintain all records
<ul style="list-style-type: none"> • Will provide reporting including access to the DB as needed
N. Performance Measures
<ul style="list-style-type: none"> • There is no provided answer for this
O. Reports
<ul style="list-style-type: none"> • There is no provided answer for this
2. Staffing
<ul style="list-style-type: none"> • Provided in Attachment 8
<ul style="list-style-type: none"> • Will be the designated manager of that group
<ul style="list-style-type: none"> • Developed and included in attachment 9 • Included FTE estimates
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided a work plan in attachment 10
<ul style="list-style-type: none"> • Provided in attachment 11



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202406113
RFP TITLE: Professional Training and Certification Services

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

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

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

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

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

Signed by:
Daniel Dresser
A029D010E06B446...
Signature

Nov-27-2024
Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202406113
RFP TITLE: Professional Training and Certification Services

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

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

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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:

Chelsea Barry

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Signature

Nov-27-2024

Date



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

**Janet T. Mills
Governor**

**Sara Gagné-Holmes
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202406113
RFP TITLE: Professional Training and Certification Services**

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

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

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

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

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

Signed by:

Miranda Whalen

47FA02C0A50048D...

Signature

Nov-27-2024

Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202406113
RFP TITLE: Professional Training and Certification Services

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

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

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

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

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

DocuSigned by:
Melanie Messina
CSD1E203F200439...
Signature

Nov-27-2024
Date