

**State of Maine
Master Score Sheet**

RFP# 202502024				
Independent Reviewer				
Bidder Name:		Berry, Dunn, McNeil & Parker, LLC	Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)	Columbus Medical Services, LLC dba The Columbus Organization
Proposed Cost:		\$899,820.00	\$899,980.00	\$896,406.00
Scoring Sections	Points Available			
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass
Section II: Qualifications and Experience	25.00	15.00	22.00	13.00
Section III: Proposed Services	35.00	17.00	30.00	17.00
Section IV: Cost Proposal	25.00	24.91	24.90	25.00
SUBTOTAL		56.91	76.90	55.00
Presentation/Interview	15.00	N/A	13.00	N/A
TOTAL	<u>100.00</u>	<u>56.91</u>	<u>89.90</u>	<u>55.00</u>
Bidder Name:		Inspired Consulting Group LLC	Mid Coast Mediation & Notary, LLC.	University of Connecticut
Proposed Cost:		\$898,280.00	\$234,000.00	\$898,606.67
Scoring Sections	Points Available			
Section I: Preliminary Information	Pass/Fail	Pass	Fail	Pass
Section II: Qualifications and Experience	25.00	22.00	N/A	22.00
Section III: Proposed Services	35.00	32.00	N/A	30.00
Section IV: Cost Proposal	25.00	24.95	N/A	24.94
SUBTOTAL		78.95	N/A	76.94
Presentation/Interview	15.00	13.00	N/A	8.00
TOTAL	<u>100.00</u>	<u>91.95</u>	<u>Disqualified in Section I</u>	<u>84.94</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# 202502024 Independent Reviewer

I. Summary

Through RFP# 202502027 the Department sought proposals for an Independent Reviewer to serve as a neutral third party to gather, analyze, and report on information and data reflecting the State's progress in complying with and implementing the terms a recently enacted Settlement Agreement. Six Bidders responded to the RFP:

- Berry, Dunn, McNeil & Parker, LLC
- Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)
- Columbus Medical Services, LLC dba The Columbus Organization
- Inspired Consulting Group LLC
- Mid Coast Mediation & Notary, LLC.
- University of Connecticut

Through the evaluation process, Inspired Consulting Group LLC (Inspired Consulting) received the highest score and was determined to provide the best value to the State of Maine.

II. Eligibility and Evaluation Process

An Evaluation Team, composed of six members, three Maine DHHS employees and three US DOJ employees, verified the Bidders' eligibility requirements and applied the consensus method in scoring the Bidders' Qualifications & Experience, Proposed Services and response during the Presentations/Interviews. Scores for the Cost Proposals were assigned using a mathematical formula.

III. Qualifications & Experience of Conditional Awardee

Inspired Consulting 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

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

V. Presentation/Interview by the Conditional Awardee

Inspired Consulting demonstrated the ability to ensure the State succeeds in meeting the requirements outlined in the Settlement Agreement.

VI. Cost Proposal

Inspired Consulting provided an initial-period-of-performance cost of \$898,280.00.

V. Conclusion

Out of 100 possible points, the Evaluation Team awarded Inspired Consulting a score of 91.95. The strength of Inspired Consulting's proposal outweighed the other Bidders through its qualifications and experience and the services and cost it proposed. The Evaluation Team determined that the proposal submitted by Inspired Consulting represents the best value to the State of Maine.

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April 11, 2025

Via Electronic Mail: jsullivan@berrydunn.com

Berry, Dunn, McNeil & Parker, LLC
Julie Sullivan
2211 Congress Street
Portland, ME 04102

SUBJECT: Notice of Conditional Contract Award under RFP #202502024, Independent Reviewer

Dear Ms. Sullivan,

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 Behavioral Health for Independent Reviewer services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

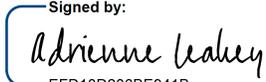
This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract.

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

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

Sincerely,

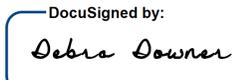
Signed by:



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Adrienne Leahey
Chief Operating Officer
Office of Behavioral Health

DocuSigned by:



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Debra Downer
Deputy Director for Competitive Procurement
Division of Contract Management

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April 11, 2025

Via Electronic Mail: kate@stargroup.live

Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)
Kate Gibbons, Chief Change Agent/Principal/Founder
707 Riverside Drive SW
Albuquerque, NM 87105

SUBJECT: Notice of Conditional Contract Award under RFP #202502024, Independent Reviewer

Dear Ms. Gibbons,

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 Behavioral Health for Independent Reviewer services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely,

Signed by:



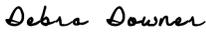
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Adrienne Leahey

Chief Operating Officer

Office of Behavioral Health

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April 11, 2025

Via Electronic Mail: ddenucci@columbusorg.com

Columbus Medical Services, LLC dba The Columbus Organization
Donna DeNucci, Proposal Manager
350 Sentry Parkway Building 620, Suite 120
Blue Bell, PA, 19422

SUBJECT: Notice of Conditional Contract Award under RFP #202502024, Independent Reviewer

Dear Ms. DeNucci,

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 Behavioral Health for Independent Reviewer services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely,

Signed by:



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Adrienne Leahey
Chief Operating Officer
Office of Behavioral Health

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April 11, 2025

Via Electronic Mail: Chris@InspiredCG.com

Inspired Consulting Group, LLC
Chris McLaughlin, MSW, LCSW
534 Woods Edge Road
Hermon, ME 04401

SUBJECT: Notice of Conditional Contract Award under RFP #202502024, Independent Reviewer

Dear Mr. McLaughlin,

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 Behavioral Health for Independent Reviewer services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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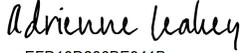
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

Signed by:



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Adrienne Leahey
Chief Operating Officer
Office of Behavioral Health

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April 11, 2025

Via Electronic Mail: midcoastmediationme@gmail.com

Mid Coast Mediation & Notary, LLC.
Shiela Leonard, Esq.
21 Jefferson Street Extension
Rockland, ME 04841

SUBJECT: Notice of Conditional Contract Award under RFP #202502024, Independent Reviewer

Dear Ms. Leonard,

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 Behavioral Health for Independent Reviewer services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely,

Signed by:



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Adrienne Leahey
Chief Operating Officer
Office of Behavioral Health

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Debra Downer
Deputy Director for Competitive Procurement
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April 11, 2025

Via Electronic Mail: deborah.harburger@uconn.edu

University of Connecticut
Deborah Harburger
38 Prospect Street
Hartford, CT 06103

SUBJECT: Notice of Conditional Contract Award under RFP #202502024, Independent Reviewer

Dear Ms. Harburger,

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 Behavioral Health for Independent Reviewer services. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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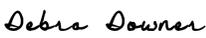
Signed by:



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Adrienne Leahey
Chief Operating Officer
Office of Behavioral Health

DocuSigned by:



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Debra Downer
Deputy Director for Competitive Procurement
Division of Contract Management

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Berry, Dunn, McNeil & Parker, LLC
DATE: March 24 & 27, 2025

SUMMARY PAGE

Department Name: Health and Human Services
Name of RFP Coordinator: Debra Downer
Names of Evaluators: Dean Bugaj, Andrew Eppich, Kristen McAuley, Sara Olsen, Nonny Onyekweli George, Victoria Thomas

<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. Qualifications and Experience	25.00	15.00
Section III. Proposed Services	35.00	17.00
Section IV. Cost Proposal	25.00	24.91
	Subtotal	56.91
Presentation/Interview	15.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>56.91</u>

As the Bidder did not meet the required minimum score of 72 or higher for Sections II, III, and IV, the Bidder was not invited to provide a formal presentation/interview to the evaluation team.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Berry, Dunn, McNeil & Parker, LLC
DATE: March 24 & 27, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information - Eligibility

Evaluation Team Comments:

Demonstrated eight (8) years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, with direct experience in one (1) or more rural areas, including facilitating and overseeing administration, funding, and delivery of such services; system-wide transformation; or transitions to Community-Based Services from Out-of-Home Placements; and eight (8) years of experience in auditing, research, program evaluation, statistics, or data (qualitative and quantitative) analysis of Community-Based Services for Children with Behavioral Health Disabilities or similar services.
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Berry, Dunn, McNeil & Parker, LLC
DATE: March 24 & 27, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	15.00

Evaluation Team Comments:

Part IV. Section II. Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Have several projects with similar population size and similar Rural areas • Do not appear to have past performance related to children with behavioral health issues • Did not provide a project specific to the services outlined in the RFP, focus more on projects adjacent to RFP description such as cost analysis/IT rather than client services. Does not appear to have experience transitioning individuals • Robust history working with states in compliance, review, etc. • Experience highlight's ability to meet ambitious timelines and modernizing programs • Figure 2 does not demonstrate a depth of conflict resolution but more of an internal process • Demonstrates workforce training and assessment knowledge
2. Subcontractors
<ul style="list-style-type: none"> • Does not intend to utilize subcontractors
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • Provided as required
5. Financial Viability
<ul style="list-style-type: none"> • Appear financially viable

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Berry, Dunn, McNeil & Parker, LLC
DATE: March 24 & 27, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35.00	17.00

Evaluation Team Comments:

The response to the scope includes limited mention of the Department of Justice (DOJ) as a Party of the agreement and the implications thereof.

In addition, the overall response lacks detail. When detail is provided it lacks alignment with the expectations and goals of the Agreement.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • Unclear whether Bidder understands the full scope of the Agreement or how the Agreement integrates with the services outline in the RFP, or the role of the Independent Reviewer <ul style="list-style-type: none"> ▪ Intends to rely on national benchmarks although there are benchmarks listed in the Agreement ▪ While there is an appropriate focus on some elements of the system of care the totality is not reflected • Demonstrated ability to utilize a problem-solving approach to resolve amicably any disagreements that arise • Highlighted elements such as active listening, engagement with integration coordinator, and focus on root causes which are beneficial to the overall approach • Will continually seek feedback from all stakeholders to assess effectiveness of progress and reinforce shared commitments • Will meet with the Department to internally review any materials prior to testifying. Does not seem to understand neutral/independent role of Independent Reviewer.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • Noted focus on CRCF / out-of-home care (including higher risk facilities), uncertain about focus on transitions • Provided insufficient detail related to how the data elements requested by the Independent Reviewer would be identified • Data elements identified are not sufficient to fully review the system of care

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Berry, Dunn, McNeil & Parker, LLC

DATE: March 24 & 27, 2025

<ul style="list-style-type: none"> • Intended methodology for analysis of requested data is insufficient or missing • Description of assessment does not seem grounded in any specifics about system transformation from institutional services to children being able to remain in family homes long-term • Intend to gather feedback from a variety of Stakeholders, including families / children, interviews with Care Coordinators, and focus groups • Will review and analyze performance indicators including service utilization rates, wait times, and health and wellbeing of placement stability • Will provide advance notice for interviews to ensure an opportunity for representation of Department and State counsel
C. Additional Requirements
<ul style="list-style-type: none"> • Will analyze workforce trends for stabilization or growth in shortages
D. Budget
<ul style="list-style-type: none"> • Agrees to Budget requirements
E. Reports
<ul style="list-style-type: none"> • Agrees to Reports requirements
F. Experience and Qualifications
<ul style="list-style-type: none"> • Lead Reviewer will dedicate 50% of time and has the required education and experience with Residential Treatment Facilities. However, this experience doesn't reflect the broader system of care and the focus on transition to home-based care • Reflected projects provided in Appendix D to demonstrate experience and qualification do not reflect the pertinent experience and qualification of the Independent Review, staff, or consultants
G. Technical Assistance
<ul style="list-style-type: none"> • Lacks detail on ability to provide technical assistance across all areas • Has additional resources within the organization to provide technical assistance
H. Confidentiality Requirements
<ul style="list-style-type: none"> • Will set up a secure portal for data transfers • Has an information security policy and cyber security plan in place • Has a compliance officer to manage compliance with requirements • Hard drives are encrypted for secure transmission of data
I. Reports
<ul style="list-style-type: none"> • Agree to submission and timeline of Reports requirements
2. Staffing
<ul style="list-style-type: none"> • Did not provide Job Descriptions, included resumes, which the evaluation team did not consider • Information in the Staffing Plan (related to the Subject Matter Experts) does not align with the roles and responsibilities of the Independent Reviewer
3. Implementation – Work Plan
<ul style="list-style-type: none"> • Staff assignments in the Work Plan do not align with the Staffing Plan hours (time allocation)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Berry, Dunn, McNeil & Parker, LLC

DATE: March 24 & 27, 2025

- | |
|---|
| <ul style="list-style-type: none">• Work plan was clear and easy to follow and included specific details for various portions of the workplan |
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Berry, Dunn, McNeil & Parker, LLC

DATE: March 24 & 27, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$896,406.00	÷	\$899,820.00	x	25 points	=	24.91

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Debra Downer

Names of Evaluators: Dean Bugaj, Andrew Eppich, Kristen McAuley, Sara Olsen, Nonny Onyekweli George, Victoria Thomas

<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. Qualifications and Experience	25.00	22.00
Section III. Proposed Services	35.00	30.00
Section IV. Cost Proposal	25.00	24.90
	Subtotal	76.90
Presentation/Interview	15.00	13.00
<u>Total Points</u>	<u>100.00</u>	<u>89.90</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information - Eligibility

Evaluation Team Comments:

Demonstrated eight (8) years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, with direct experience in one (1) or more rural areas, including facilitating and overseeing: administration, funding, and delivery of such services; system-wide transformation; or transitions to Community-Based Services from Out-of-Home Placements; and eight (8) years of experience in auditing, research, program evaluation, statistics, or data (qualitative and quantitative) analysis of Community-Based Services for Children with Behavioral Health Disabilities or similar services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	22.00

Evaluation Team Comments:

Part IV. Section II. Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Demonstrated experience in Rural areas includes one state and one county • Demonstrated success in transitioning individuals • Exhibited effort to research Maine systems • Have worked to secure funding for children with behavioral health • Substantial experience with children and children with behavioral disabilities • Provided projects with relevant/direct experience • Response lacks detail on the Bidder’s skills and approach to mediation, conflict resolution and problem-solving • Demonstrated experience across multiple facets of administration, funding, and delivery of community-based services related to children with behavioral health disabilities
2. Subcontractors
<ul style="list-style-type: none"> • Subcontract has experience in multiple states with similar populations and sizes as Maine
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Met requirement
4. Litigation
<ul style="list-style-type: none"> • Indicated none
5. Financial Viability
<ul style="list-style-type: none"> • Provided as required

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments:

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • Provided a comprehensive response to the Independent Reviewer’s Role and Authority • Incorrectly refers to Integration Coordinator as “Interagency Coordinator” throughout the proposal • Referenced children in State custody, however these children are a minority within the scope of the Agreement • Exhibit 1 is a well-done graphic that is clear and represents a comprehensive approach • Clearly articulated success indicators • Completed a preliminary review of the DOJ letter of investigatory findings • Non-responsive to testifying in any case between the Parties regarding matter relating to the implementation, enforcement, or dissolution of the Agreement • Plan involves State, stakeholders, and families to understand the landscape of services before evaluating behavioral health system performance • Understands the Independent Reviewer is a neutral to resolve different points of view between the Parties
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • Provided a logic model which is a nice representation of their approach and demonstrates understanding of Agreement • Proposes working with the State to develop query templates and regular reporting to minimize the impact of data requests on the State • Unclear how the Local Leadership Team will be formed and maintained to fulfill the expectations of this proposal • Description of ad-hoc reports demonstrated a knowledge of the agreement requirements as well as resource restraints • Response to ensure the Department and/or State counsel is afforded the opportunity to be present when the Independent Review interviews State

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

<p>employees or staff is at the Bidder’s discretion. However, it is at the State’s discretion to determine when counsel would be included</p> <ul style="list-style-type: none"> • Demonstrated ability to work with administrative data sets, clearing and sorting data necessary for analysis. Noted working on ‘Best fit” for data that may not be available
C. Additional Requirements
<ul style="list-style-type: none"> • Provided a clear detailed response which demonstrated ability to meet Additional Requirements • Proposed a clear format for non-compliant, partial-compliant, and full-complaint • Full commitment to Trauma-Informed Care compliance
D. Budget
<ul style="list-style-type: none"> • Agrees to Budget requirements
E. Reports
<ul style="list-style-type: none"> • Provided a clear, articulated response to Reports requirements which includes thoughtful organization and approach • Demonstrates understanding of the importance of considering feedback and comments from both parties, and understands the final report findings are the responsibility of the Independent Reviewer
F. Experience and Qualifications
<ul style="list-style-type: none"> • Staff with demonstrated experience in state government and consulting roles administering children’s behavioral health services, system transformation as part of settlement monitoring teams, social science research, etc. • Team lead is allocated for more than 0.5 FTE
G. Technical Assistance
<ul style="list-style-type: none"> • Demonstrated ability to provide technical assistance on children’s behavioral health system transformation to community-based services under the Agreement • Response well-articulated. Note PDSA cycles, three-part framework that focuses on content, process, and relationships • If TA need, exceeds available resources, will work with the Parties to explore additional consulting support
H. Confidentiality Requirements
<ul style="list-style-type: none"> • Agree to comply with Confidentiality Requirements
I. Reports
<ul style="list-style-type: none"> • Will develop a project plan for Reports submissions
2. Staffing
<ul style="list-style-type: none"> • Staffing plan time allocation does not align with time allocation provided in the Bidder’s response to Part II, F. Experience and Qualifications
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Work plan (Gantt) was difficult to read and confusing • Allocated time for a planning period, which provided a clear pathway to start-up and landscape analysis

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

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| <ul style="list-style-type: none">• Allocated time for ad-hoc reports• Establish baseline measures of current system, to serve to show progress |
|--|

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$896,406.00	÷	\$899,980.00	x	25 points	=	24.90

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: March 24, 27, and April 9, 2025

PRESENTATION/INTERVIEW

	<u>Points Available</u>	<u>Points Awarded</u>
Presentation/Interview	15.00	13.00

Evaluation Team Comments:

- Question whether they understand that children in the child welfare system and/or juvenile justice are a minority of the focus population
- Demonstrated a leadership experience in being a neutral Independent Reviewer
- Team complemented each other's strengths and weaknesses
- Demonstrated an interest in understanding Maine and achieving the goals of the Agreement
- Answers comprehensively addressed qualitative and quantitative methodologies
- Reliance on shared values and settlement agreement components as a framework for Parties conflict resolution
- Emphasized the importance of lived experience and trauma informed care, with real life examples
- Acknowledged need to learn the entities and relationships that make up Stakeholders within Maine
- Reflected an understanding of the work and the resources necessary to achieve the goals of the Agreement

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Columbus Medical Services, LLC dba The Columbus Organization

DATE: March 24 & April 1, 2025

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Debra Downer

Names of Evaluators: Dean Bugaj, Andrew Eppich, Kristen McAuley, Sara Olsen, Nonny Onyekweli George, Victoria Thomas

<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. Qualifications and Experience	25.00	13.00
Section III. Proposed Services	35.00	17.00
Section IV. Cost Proposal	25.00	25.00
	Subtotal	55.00
Presentation/Interview	15.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>55.00</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Columbus Medical Services, LLC dba The Columbus Organization

DATE: March 24 & April 1, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information - Eligibility

Evaluation Team Comments:

Demonstrated eight (8) years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, with direct experience in one (1) or more rural areas, including facilitating and overseeing: administration, funding, and delivery of such services; system-wide transformation; or transitions to Community-Based Services from Out-of-Home Placements; and eight (8) years of experience in auditing, research, program evaluation, statistics, or data (qualitative and quantitative) analysis of Community-Based Services for Children with Behavioral Health Disabilities or similar services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Columbus Medical Services, LLC dba The Columbus Organization

DATE: March 24 & April 1, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	13.00

Evaluation Team Comments: Overall response to the Bidder’s Qualifications and Experience lacked clarity and specificity which made it difficult for the evaluation team to ascertain relevant experience

Part IV. Section II. Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 41-year history working with over 150 agencies in 47 states • Experience with monitoring services, system reviews, risk management, technical assistance, best practice guidelines • It is unclear the full scope of the Bidder’s experience in Community Based setting as defined by the Agreement • Early Start Program project is not relevant to the services outline in the RFP or the Agreement • Lacked detail on how the Bidder will apply their skills and/or experience related to mediation, conflict resolution, and/or problem-solving to the deliverables and activities in the RFP
2. Subcontractors
<ul style="list-style-type: none"> • Intends to utilize 2 subcontracts with relevant information
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Provided as required
4. Litigation
<ul style="list-style-type: none"> • Provided as required by the RFP
5. Financial Viability
<ul style="list-style-type: none"> • Appear financially viable

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Columbus Medical Services, LLC dba The Columbus Organization

DATE: March 24 & April 1, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35.00	17.00

Evaluation Team Comments: Overall response to the Bidder’s Proposed Services lacked detailed description of how the Bidder would accomplish tasks outlined in the RFP.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • Have a core team and will utilize additional subject matter experts as needed • Familiarized themselves with the Agreement, however, did not detail how they would accomplish the goals of the Agreement • Response to testifying in any case between the Parties indicates the Project Director and Lead have demonstrated experience. However, the org chart indicates TBD for these positions. Unclear if the two positions are filled. • Demonstrated an ability to conduct problem-solving approach to resolve amicably any disagreements between Parties
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • Overall response restates the language within the Agreement which lacks detail or methodology of the required deliverables
C. Additional Requirements
<ul style="list-style-type: none"> • Lists specific trauma-informed care training concepts and availability of training for all employees • Response acknowledges deliverable requirements but does not provide detail or approach to meeting the deliverables
D. Budget
<ul style="list-style-type: none"> • Acknowledged and agreed to meet deliverables
E. Reports
<ul style="list-style-type: none"> • Response does not demonstrate the Bidder’s written communication skills to develop the required reports • Response fundamentally misunderstands purpose of the Agreement reporting because Bidder focuses on State run facilities and critical deficiencies
F. Experience and Qualifications

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Columbus Medical Services, LLC dba The Columbus Organization

DATE: March 24 & April 1, 2025

- Will appoint at least one lead individual at .5 FTE and will fill team with subject matter experts. With individuals not identified for this work, the Team cannot rate the staff meet minimum quals for the RFP.
- Have subject matter experts in all necessary subject areas, but that is a challenge to confirm when no staff are described for this project, relying on to be determined individuals. Instead, Bidder relies on work history and relevant projects to reinforce expertise in project areas.

G. Technical Assistance

- Overall response restates the language within the Agreement which lacks detail or methodology of the required deliverables
- Understanding of Technical Assistance is not aligned with the Agreement

H. Confidentiality Requirements

- Offers a privacy officer who will train all employees within 30 days of hire

I. Reports

- Agree to submission and timeline of Reports requirements

2. Staffing

- Describes minimum staffing – lacks details
- Did not specifically describe how subcontractors/consultants will interact with the Bidder's organization
- Overall staffing plan is unclear

3. Implementation - Work Plan

- Timeline includes general requirements but does not go beyond listing requirements of Agreement. No synthesis and lacks detail for the milestones.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Columbus Medical Services, LLC dba The Columbus Organization

DATE: March 24 & April 1, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$896,406.00	÷	\$896,406.00	x	25 points	=	25.00

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Inspired Consulting Group LLC
DATE: March 24, April 1, and 9 2025

SUMMARY PAGE

Department Name: Health and Human Services
Name of RFP Coordinator: Debra Downer
Names of Evaluators: Dean Bugaj, Andrew Eppich, Kristen McAuley, Sara Olsen, Nonny Onyekweli George, Victoria Thomas

<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. Qualifications and Experience	25.00	22.00
Section III. Proposed Services	35.00	32.00
Section IV. Cost Proposal	25.00	24.95
	Subtotal	78.95
Presentation/Interview	15.00	13.00
<u>Total Points</u>	<u>100.00</u>	<u>91.95</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Inspired Consulting Group LLC

DATE: March 24, April 1, and 9 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information - Eligibility

Evaluation Team Comments:

Demonstrated eight (8) years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, with direct experience in one (1) or more rural areas, including facilitating and overseeing: administration, funding, and delivery of such services; system-wide transformation; or transitions to Community-Based Services from Out-of-Home Placements; and eight (8) years of experience in auditing, research, program evaluation, statistics, or data (qualitative and quantitative) analysis of Community-Based Services for Children with Behavioral Health Disabilities or similar services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Inspired Consulting Group LLC
DATE: March 24, April 1, and 9 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	22.00

Evaluation Team Comments:

Part IV. Section II. Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Has provided direct service provision, compliance monitoring, and administration of programs and services in Maine • Systemic transformation experience is not detailed • Have experience with families in behavioral health and criminal justice • Have DEI experience and understands the overall representation • Have a longstanding commitment to and experience with the relevant population • Experience monitoring Medicaid funded services • Provided relevant projects <ul style="list-style-type: none"> ○ Wings project includes experience with children in out-of-State placement • Has demonstrated leadership training in conflict resolution
2. Subcontractors
<ul style="list-style-type: none"> • Detailed response to the utilization of subcontractors
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • Indicated none
5. Financial Viability
<ul style="list-style-type: none"> • Appear financially viable

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Inspired Consulting Group LLC
DATE: March 24, April 1, and 9 2025

**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments: Response made intangible complex concepts tangible through concrete examples

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • Demonstrated understanding of the review process • Clearly understands that testimony may include legal proceedings. Clear methodological approach, data analyzed, and bases for conclusions and recommendations • Addresses on how to work with "Parties" but does not specifically discuss working with DOJ, who is one of the Parties • Describes conflict and mediation strategies but does not specifically contemplate dealing with conflict between State and DOJ • Demonstrates an understanding of ex parte communications • Description of program evaluation shows understanding of evaluation processes, task assignments, and intended outcomes • Clear understanding of the IR role and process in order to achieve the desired results
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • Included examples of potential data elements that show an understanding of the system • Provided methods for qualitative and quantitative measures which demonstrates an understanding • Provided a detailed response to ad-hoc analysis • Directly indicated who would be completing each task • Have a structured request process for data, including protocol and confidentiality • Clearly detailed and demonstrated an understanding of how the Department and/or State counsel will be afforded the opportunity to be present in the IR interviews with State employees/staff
C. Additional Requirements

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Inspired Consulting Group LLC

DATE: March 24, April 1, and 9 2025

- Described in clear detail proving specific elements of how the requirements will be met
- Goal of early identification of compliance risks
- Dynamic compliance monitoring schedule allowing for targeted reviews based on emerging issues, stakeholder concerns, and evolving data trends
- reference recruitment and retention strategies; discussion of identifying patterns and compare to historical trends; includes reference to whether workforce strategies are improving access and timeliness
- Demonstrated a clear understanding of Trauma-Informed Care approach

D. Budget

- Provided a robust response to budget development and components

E. Reports

- Report structure includes Exec summary, compliance analysis, data insights, stakeholder perspectives and recommendations
- Takes into consideration the need for redactions and issues of confidentiality
- Clearly understands the independence of the IR related to reporting
- Understanding of the importance of reviewing service sustainability with an eye “beyond the Agreement’s term”

F. Experience and Qualifications

- Response did not include detail but more of an acknowledgement of the requirements

G. Technical Assistance

- Well-articulated and detailed and includes incorporation of Evidence Based Practice into real world implementation, Key Performance Indicators for Continuous Improvement of Quality Assurance, etc.

H. Confidentiality Requirements

- Provides regular cyber security training to staff
- Provided a detailed response to meeting the requirement for confidentially.

I. Reports

- Agree to submission and timeline of Reports requirements

2. Staffing

- Detailed response to interacting with subcontractors/consultants related to oversight and management
- Job description of Independent Reviewer recognizes leadership role and importance of clear communication of progress of the State.
- Administrative Coordinator has clear role planning site visits, organizing and maintaining records, etc.
- Program Evaluator will design program eval plans and methodologies, etc. Must have experience conducting program evals, within behavioral health, social services, or related fields.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Inspired Consulting Group LLC

DATE: March 24, April 1, and 9 2025

- Project Manager will have bird's eye view of goals, timelines, oversee project milestones and track them.
- Engagement Specialist to work directly with stakeholders

3. Implementation - Work Plan

- Provided a good approach, but lacks detail and is not sufficiently tied to the Agreement

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Inspired Consulting Group LLC

DATE: March 24, April 1, and 9 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$896,406.00	÷	\$898,280.00	x	25 points	=	24.95

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Inspired Consulting Group LLC
DATE: March 24, April 1, and 9 2025

PRESENTATION/INTERVIEW

	<u>Points Available</u>	<u>Points Awarded</u>
Presentation/Interview	15.00	13.00

Evaluation Team Comments:

- Demonstrated strong relationship with Maine providers
- Unclear if the role of the Independent Review is clearly understood, as it related to assessing compliance under the Agreement rather than supporting direct implementation
- Strong response to navigating disagreements with Parties
- Did not specifically respond to how a dispute would be resolved
- Throughout the answers, centered family voice and choice as a primary consideration from the micro level to the macro level for systems change
- Necessary workforce system changes need to occur
- Did not specifically address how the IRs role to appropriately review associated outputs and outcomes would be accomplished
- Demonstrated an understand of the team who would be providing working under the Agreement
- Believes, the State can succeed
- Will include an individual with lived experience as part of the team conducting the work
- Referred to admin support doing report writing where the IR Lead should be developing the report
- Has a strong knowledge and experience with Maine’s behavioral health system, its strengths and challenges
- Had direct experience with supporting children and families throughout Maine

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: Mid Coast Mediation & Notary, LLC.
DATE: March 24, 2025

SUMMARY PAGE

Department Name: Health and Human Services
Name of RFP Coordinator: Debra Downer
Names of Evaluators: Dean Bugaj, Andrew Eppich, Kristen McAuley, Sara Olsen, Nonny Onyekweli George, Victoria Thomas

<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. Qualifications and Experience	25.00	N/A
Section III. Proposed Services	35.00	N/A
Section IV. Cost Proposal	25.00	N/A
	Subtotal	N/A
Presentation/Interview	15.00	N/A
<u>Total Points</u>	<u>100.00</u>	<u>N/A</u>

Mid Coast Mediation & Notary, LLC. did not meet the Eligibility Requirements, and therefore is disqualified from further evaluation.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: Mid Coast Mediation & Notary, LLC.

DATE: March 24, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information - Eligibility

Evaluation Team Comments:

Did not demonstrated eight (8) years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, with direct experience in one (1) or more rural areas, including facilitating and overseeing: administration, funding, and delivery of such services; system-wide transformation; or transitions to Community-Based Services from Out-of-Home Placements; and eight (8) years of experience in auditing, research, program evaluation, statistics, or data (qualitative and quantitative) analysis of Community-Based Services for Children with Behavioral Health Disabilities or similar services.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER: University of Connecticut
DATE: March 24, April 1, and 9 2025

SUMMARY PAGE

Department Name: Health and Human Services
Name of RFP Coordinator: Debra Downer
Names of Evaluators: Dean Bugaj, Andrew Eppich, Kristen McAuley, Sara Olsen, Nonny Onyekweli George, Victoria Thomas

<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. Qualifications and Experience	25.00	22.00
Section III. Proposed Services	35.00	30.00
Section IV. Cost Proposal	25.00	24.94
	Subtotal	76.94
Presentation/Interview	15.00	8.00
<u>Total Points</u>	<u>100.00</u>	<u>84.94</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER: University of Connecticut

DATE: March 24, April 1, and 9 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information - Eligibility

Evaluation Team Comments:

Demonstrated eight (8) years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, with direct experience in one (1) or more rural areas, including facilitating and overseeing: administration, funding, and delivery of such services; system-wide transformation; or transitions to Community-Based Services from Out-of-Home Placements; and eight (8) years of experience in auditing, research, program evaluation, statistics, or data (qualitative and quantitative) analysis of Community-Based Services for Children with Behavioral Health Disabilities or similar services.

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	22.00

Evaluation Team Comments:

Part IV. Section II. Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Clearly articulated backgrounds of individuals and their experience • Experience is geared toward the proposed Independent Reviewer Team rather than the organization as a whole <ul style="list-style-type: none"> ○ Lead has specifically worked as Principal Investigator/Project Dir to develop services so children with complex behavioral health needs could live at home instead of out of home placements. Experience working on implementation of settlement agreements related to ADA/Olmstead ○ Experience in state administration of children’s behavioral health services ○ Noted depth of experience with EPSDT, H&CBS, Coordinated Care Organizations, and other elements of Medicaid rules / programming. Detailed description of how Medicaid knowledge will be leveraged – importance of early intervention, access to services, provider pool, challenges with rural transportation ○ Demonstrated experience with system transformation • Emphasized the importance of active families • One directly relevant project example is still new, having initiated January 2025, other project has relevant work to be completed in future contract period • Minimally responsive to mediation, conflict resolution, and/or problem-solving
2. Subcontractors
<ul style="list-style-type: none"> • Will utilize one subcontractor
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Provided as required
4. Litigation
<ul style="list-style-type: none"> • Provided as required by the RFP
5. Financial Viability
<ul style="list-style-type: none"> • Only provided 2 years of financial information (2022 and 2023), overall appears financially viable

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**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments:

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • Clearly demonstrated an understating of the role and authority of the Independent Reviewer • Clear and executable framework for assessing compliance • Focus on ensuring children are actually better off, on the State being supported to achieve outcomes, and on lasting change after agreement ends • Response to utilizing a problem-solving approach to resolve disagreements assumes the Bidder can come up with solutions that all parties are amenable to – not fully responsive to the question about how the Independent Reviewer will handle disagreement between DOJ and the State that cannot easily be resolved • Provided an objective approach to providing testimony
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • Elements of the minimum data analysis as well as iterative nature is both understood and articulated specific to incorporating changes in approach • Data analysis plan is detailed but unclear if what is being presented is fully in the scope of the Independent Reviewer • Has a number of tools that could be leveraged and customized • Intends to gain a deeper understanding of the State and its programming
C. Additional Requirements
<ul style="list-style-type: none"> • Implementation science, trauma-informed care principles, and systems of care values • Demonstrated an understanding that adult learning requires different educational theories to be effective • Provided an articulate and positive approach to policy, processes, and procedures • Values orientation, pulled out relevant goals/high level requirements of Agreement • Approach seems potentially overly academic which does not align with the intent of the Independent Reviewer’s role of the Agreement

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D. Budget
<ul style="list-style-type: none"> • Agrees to Budget requirements
E. Reports
<ul style="list-style-type: none"> • Indicates final report on compliance will be prepared 7.5 months prior to the Agreement intended termination date • Will provide an explanation for rational for not providing information in reports • Will evaluate the need and purpose for ad-hoc
F. Experience and Qualifications
<ul style="list-style-type: none"> • Demonstrate experience in implementation science • The graphic and inclusion of an implementation framework is included as part of this section, and seems to more articulate an approach that is not exclusively in alignment of the Independent Reviewer as outlined in the Agreement • Related experience to each of the points having pertinent experience and qualifications
G. Technical Assistance
<ul style="list-style-type: none"> • Demonstrate substantial experience providing technical assistance • Acknowledged settlement agreement milestones and when data could be first available based on implementation • Offers National Technical Assistance • Will review data understanding children can stay in the home and families have choices • Demonstrated track record of success
H. Confidentiality Requirements
<ul style="list-style-type: none"> • Understands HIPAA and confidentiality, and provides training to staff
I. Reports
<ul style="list-style-type: none"> • Agree to submission and timeline of Reports requirements
2. Staffing
<ul style="list-style-type: none"> • Staffing plan concerns include: <ul style="list-style-type: none"> ○ Principal Investigator with 0.05 FTE ○ Offering 0.85 FTE for the entire project • Provided detailed job descriptions
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided a good approach, but lacks detail

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**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$896,406.00	÷	\$898,606.67	x	25 points	=	24.94

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PRESENTATION/INTERVIEW

	<u>Points Available</u>	<u>Points Awarded</u>
Presentation/Interview	15.00	8.00

Evaluation Team Comments:

- | |
|---|
| <ol style="list-style-type: none">1. Demonstrated a knowledge of the Agreement as well as Settlement Agreements in other states2. Knowledge of challenges in other states could be beneficial to Maine, but did not express insight into Maine system of care or what factors could be leveraged to address these challenges in Maine, may have a heavy learning curve to Maine's provider and partner landscape3. Results-based accountability framework and implementation science discussed in a detailed manner for what can be a complicated approach4. Lack of understanding of the role of the Independent Reviewer and its importance under the Agreement5. Regarding partnership engagement and relationship development - articulated clear steps / framework, including different types of meetings, responsiveness and follow-through, transparency, etc.6. Focused on the Independent Reviewer holding meeting for transparency but did not mention role of Independent Reviewer reporting, or State's obligations to be transparent and hold meetings7. Response to staffing plan not designed to address ambiguity or unexpected challenges in the Agreement's implementation throughout the term of the Agreement8. Conflated responsibility of the Independent Reviewer with the responsibility of the State to accomplish goals of agreement |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC
DATE: 3/23/25
EVALUATOR NAME: Dean Bugaj
EVALUATOR DEPARTMENT: DHHS/OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P - Organization has nationwide experience working with a variety state and local government entities in a number of ways including cost modeling and analysis, quality/compliance monitoring, and IT EHR quality control/compliance.• N – It appears most of their behavioral health experience is comprised of time limited projects, mostly focused on cost modeling and payment/financial analysis. 2 of 8 projects noted were more broadly focused on compliance evaluation.• N – The bidder did not include any projects to satisfy 2a – provision of home and community-based services for children with behavioral health disabilities in one or more rural areas.• N – It appears the bidder repeated many projects and narrative for expertise and experience related to the provision of behavioral health services and auditing, research, program evaluation, statistics, or data analysis.• I – One project noted appears relevant through its mention of benchmarking against compliance guidance resources from the U.S. Department of Justice, the Office of the Inspector General, U.S. Department of Health and Human Services, and the Health Care Compliance Association; however, this project was just 2 months in length.

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – organization has a 51 year history serving state, local and quasi-government agencies in professional services including management, IT, financial consulting as well as tax, auditing, and accounting services.• P – Bidder supplied background of multiple projects over the past 10 years that describe experience working with state agencies in a variety of areas.• P – bidder knowledge and experience in Medicaid/EPSTD noted working collaboratively with federal HHS, CMS and partner organizations such as NAMD to understand federal policy guidelines, changes that may impact this work. Also noted monitoring state laws and helping develop cost allocation plans and rates that comply with Medicaid.

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EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

<ul style="list-style-type: none">• N – Bidder referred to their descriptions of related projects to explain how the experience will be applied to the deliverables and activities of this RFP.• I – Bidders response to mediation and conflict resolution noted foundations of independence, transparency, and patience. Noting mediation focuses on consensus and outlined a conflict resolution process at various levels of escalation.• P – Bidder supplied two projects related to experience for this work. This first, related to reviewing and monitoring residential programming in Missouri, including addressing compliance issues and development of corrective action plans. The second with Vermont conducting a variety of reviews to identify potential risks, gain an independent perspective of the proposed project plans and contracts, and determining readiness to proceed with a new system.• I – none of the projects noted are directly related to the scope of this RFP, though skills may be transferrable.
2. Subcontractors
<ul style="list-style-type: none">• P – Bidder noted they will not be using subcontractors
3. Project Team Organizational Chart
<ul style="list-style-type: none">• P – Org chart supplied with names and roles of individuals noted.• I – Bidder projects use of eight people to make up the team for IR.
4. Litigation
<ul style="list-style-type: none">• I – two noted accounts of litigation, one regarding information security, in process to being settled, the other employment related with the bulk of claims dismissed with exception to a \$4000 claim of Breach of Promise/Detrimental Reliance.
5. Financial Viability
<ul style="list-style-type: none">• I – Bidder noted they are not required to have financial statements, audited or unaudited relating to financial operations• I – Bidder supplied a revenue growth chart showing a strong increase in revenue over the past 20 years.• I – Bidder stated they would provide additional information at the Department's request.• I – Bidder included a letter from TD bank noting their working capital line of credit and 30 year history of financial capacity and credit worthiness.• P - Using balance sheet, Current ratio is well over 1, showing financial strength and adequate cash on hand to pay their bills. 2022 - 3.52, 2023 – 3.23, 2024 – 3.88

Part IV, Section III. Proposed Services

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DATE: 3/23/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P – Discussed process of project planning and verifying role of IR in monitoring and upholding the agreement. N – The planning described seems to ignore the role of DOJ in this process and the need for collaboration across all parties in this effort. • I – Noted setting up a secure portal for DHHS and stakeholders to share data and relevant information, documents, and reports. • I – bidder specifically notes reviewing care plans for BHH and CRCF services, relevant to reviewing community return. This ignores targeted case management reviews to assure the ISP includes all elements in B.5 of the Agreement. • P – Bidder noted conducting site visits of children’s residences, quarterly meetings with care coordinators and relevant staff, biannual in-person and virtual focus groups with families and natural supports, focusing on a trauma informed approach. • P – bidder noted performance indicators including utilization rates, wait times, health and well-being outcomes, placement stability, to evaluate effectiveness of strategies employed. • I – Bidder noted creating a Deliverables Expectations Document to aid in tracking compliance with terms of the agreement.
<ul style="list-style-type: none"> • P – Bidder noted problem solving rooted in active listening, empathy, mediation, collaboration, root cause analyses, and conflict resolution techniques – noted maintaining focus on state’s compliance with the Agreement. • P – noted will continually seek feedback from all stakeholders to assess effectiveness of progress and reinforce shared commitments.
<ul style="list-style-type: none"> • P – noted will approach communication with transparency, professionalism, contractual and ethical obligations, assuring communication structured, purposeful and aligned with the agreement.
<ul style="list-style-type: none"> • I – noted will keep detailed records of all findings, observations and recommendations to assure fact based testimony. • I – noted will provide DHHS with pre-testimony briefings to ensure understand of findings and observations, and implications to the agreement.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • I – Assessment methodology plan noted elements the plan will include including data elements, quarterly interviews, biannual focus groups, data

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<p>collection and analysis techniques, communication protocol, problem solving approach, reporting schedule and timeline, and expectations of stakeholder involvement.</p> <ul style="list-style-type: none"> • I – Bidder notes “diverse and comprehensive information collection and analysis techniques specific to elements of the agreement but does not consider broader system analysis for assessing health of the CBH system as a whole, including timeliness in access to services.
<ul style="list-style-type: none"> • I – Bidder noted they will submit any ad-hoc reports, similar to issue briefs, contingent upon availability and capacity to complete additional reports.
<ul style="list-style-type: none"> • N – Bidder noted an assessment and review plan that is methodological, but assumes a capacity far larger than exists in the delivery system. For example, the plan lays out reviewing 33% of CRCF programs via desk review, then selecting 25% of those reviewed for on-site reviews. Maine currently has 9 residential providers with 20 sites across the state. Doing a desk audit of seven facilities a year could be effective, but then selecting 25% for on-site review would make a very small data set that would not be a representative sample of functioning across the system. • I – Family oriented surveys could be a way to expand reach of feedback, but would have to consider how to achieve a statistically valid response rate.
<ul style="list-style-type: none"> • I – Bidder notes will work with state on data gathering and will set up a secure portal for data delivery.
<ul style="list-style-type: none"> • I – Bidder noted would conduct planned interviews, sharing the planned interviews in advance with the Department, extending invites to the Department or its Counsel for state employees or staff.
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • I – bidder stated they will review the implementation plan within 30 days upon receipt.
<ul style="list-style-type: none"> • P – Bidder noted they will analyze workforce trends for stabilization or growth in shortage along with review of semiannual reports.
<ul style="list-style-type: none"> • I – Bidder noted they will review the training policy and will engage their Research and Education Center as needed.
<ul style="list-style-type: none"> • P – Bidder noted process and procedures will include focus on clarity and comprehensiveness of language, consistency across different areas, and impact on staff, providers, families, and children.
<ul style="list-style-type: none"> • I – bidder stated they will review compliance at all times.
<ul style="list-style-type: none"> • P – bidder noted will leverage six core SAMSHA principles to trauma informed care. • N – Application lacked detail on how they will do this.

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D. Budget
<ul style="list-style-type: none">• I – Bidder notes they will supply a budget for any contract renewals 120 days prior to start of the renewal period.
E. Reports
<ul style="list-style-type: none">• I – bidder noted they will conduct a systematic review of the State’s performance during each fiscal year and will document compliance with stated metrics.
<ul style="list-style-type: none">• I – Bidder stated they will complete the report for review at 10 months to assure submission at 9 months prior to the end date.
<ul style="list-style-type: none">• I – Bidder stated they will draft annual compliance report with necessary elements and will include recommendations on compliance toward preventing unnecessary out of home placements, supporting transition to a family home, and ensuring timely access to community-based services.
<ul style="list-style-type: none">• I – bidder stated they would meet the requirements of this section.
<ul style="list-style-type: none">• I – Bidder noted will submit final report 10 months prior to termination of the agreement, with time for feedback, performing a walk through of the report as desired, with final deliverable 15 days after feedback and 9 months prior to termination of the agreement.
<ul style="list-style-type: none">• I – bidder noted they would submit up to 3 issue brief style ad-hoc reports. This number feels arbitrary and not necessarily based on potential need.
F. Experience and Qualifications
<ul style="list-style-type: none">• I – bidder referred to staffing plan, but noted lead will be dedicated at least 50% time.
<ul style="list-style-type: none">• N – Bidder did not answer the question but instead included examples of projects leveraged in Section I to relay experience in the necessary areas. Trauma informed care practices and implementation science are not explicitly represented in this list.
G. Technical Assistance
<ul style="list-style-type: none">• I – Bidder notes will provide TA in areas required by the Agreement and will analyze whether Care coordinator has offered the family the option to submit a reasonable modification request and whether the ADA Coordinator followed the existing reasonable modification process. While this is appreciated, there could be other factors that impact these decisions beyond Care Coordination and reasonable modifications. It is unclear to the extent the bidder has expertise to supply TA across a variety of areas.
<ul style="list-style-type: none">• N – Bidder’s response lacked sufficient detail to explain how they will provide TA across the various areas, noting they will draw upon national experience.

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<ul style="list-style-type: none">• P – Bidder noted PDSA approach to assessing quality improvement interventions.• I – Bidder directly noted they can review services plans for wraparound principles.
H. Confidentiality Requirements
<ul style="list-style-type: none">• I – bidder confirmed they will comply with insurance requirements and provide a copy of insurance upon request.
<ul style="list-style-type: none">• P – bidder described their data security processes and ability to lock down files and restrict access as needed, using AES encryption, and data storage behind firewalls.
<ul style="list-style-type: none">• P – Bidder has a compliance officer monitoring and managing compliance with laws and regulations, also having a written information security policy, annual human resources training, information access controls, etc.
<ul style="list-style-type: none">• P – bidder notes all hard drives are encrypted by Bitlocker, and have policies for secure transmission and removable media. They have a Cybeseurity Incident Response Plan to follow in case of a breach.
I. Reports
<ul style="list-style-type: none">• I – Bidder notes will track and records all data through monthly status reports, ad hoc reports, and annual compliance reports. Bidder notes any recommendations will refer back to compliance with the agreement• I – Bidder noted in the Assessment methodology plan they will engage stakeholders to include diverse perspective and have a structured methodology for data collection, analysis and reporting.
<ul style="list-style-type: none">• I – Bidder states they will submit all required reports in accordance to timelines.
2. Staffing
<ul style="list-style-type: none">• P - Staffing plan submitted, job descriptions and responsibilities noted, along with individual's key qualifications for each role.• P – No subcontractors• I – Staffing plan and Org structure submitted along with estimated LOE for each employee, assuring the Lead IR is at least .50 FTE.
3. Implementation - Work Plan
<ul style="list-style-type: none">• P – Workplan supplied and projects out the initial 36 months of work, broken into discrete project areas including anticipated project close out.

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BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC

DATE: 3/24/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• Experience from 2015-2022 seeming focused on system wide transformation or evaluation with rural experience.• Broken down month by month met the eligibility threshold• No specific named leads• Many projects that are either directly or indirectly relevant, breadth is somewhat broad• Appears to meet eligibility threshold

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Formed in 1974, full range of professional services including management, IT, financial consulting, tax audit and accounting services<ul style="list-style-type: none">○ Consulting team formed in 1986• Experience around evaluation, needs assessment, planning, gap analyses, and stakeholder engagement and facilitation services for state Medicaid and HHS agencies• projects in the last 15 years that meet requirements of the RFP:<ul style="list-style-type: none">○ Alexandria, VA – 7/2015 to 3/2017 – reviewed behavioral health, SUD. And IDD services.○ KY 12/2024 to present – Needs assessment and development of a state plan for KY Adult Protective Services○ KY 1/2024 to 5/2024 – Statewide needs assessment and development of KY state plan on aging○ MI 12/2023 to present – statewide needs assessment for rehab services○ MO DSS 6/21 to 8/22 – Reviewed 39 RTFs across MO, monitoring tool to evaluate providers. Monitoring tool, TA, strengths and improvement areas○ VA 10/20 to present – Reviewed source expenditure data and developed methodology to allocate costs to behavior health and disability services programs○ VA 12/22 to 4/23 – Review of DAP programs and developed tiered rate structure to enhance support for individuals receiving DAP funds in congregate care settings

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EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

- UNSOM – 3/25 to 9/25 – Reviewed clinic's service delivery model and developed recs to improve performance, lower costs, and increase Medicaid revenues. Built statistical models to evaluate costs of delivering behavioral health services to clients and improve performance
- WA 4/22 to present – PM for establishment of community-based res treatment facilities in two Washington counties
- WA HCA 4/23 to 9/23 – Developed behavioral health services delivery guide
- WA HCA 2/24 to present – development of same day/rapid access to behavioral health care
- WV 6/27 to 12/17 – analysis of rates paid for services offered by Community-based health care providers
- Medicaid, EPSDT experience:
 - Nothing specific mentioned, some information about how the team can help with compliance with federal cost accounting and Medicaid financial and programmatic requirements
- Work directly with disability service providers, individuals with disabilities, and/or disability rights advocacy orgs
 - Alexandria, VA 7/15 – 3/17 – reviewed BH, SUD, and IDD services
 - KY 12/24 to present – Needs assessment for KY's adult protective services
 - KY 1/24 to 5/24 – Statewide needs assessment and dev of state plan on aging
 - MI 12/23 to present – statewide needs assessment for rehab services
 - MO 6/21 to 8/22 – Review of 39 RTFs
 - ND 8/23 to 2/24 – Assessment of ND's provider workforce training
 - VA 10/20 to present – dev methodology to allocate costs to behavioral health and disability services
 - DBHDS study 12/22 to 4/23 – dev tiered rate structure to enhance support for individuals receiving DAP funds in congregate care settings
- How experience can be applied to activities and deliverables:
 - MO independent review of all Level 4 res service providers, developed a monitoring tool to evaluate providers. Team went to each facility to review 550 cases. Programs are Medicaid-reimbursable and located in remote, rural regions. Proposed team members played lead roles on the project.
 - Steven Whitney has extensive experience in ME improving child welfare and JJ programs. Worked with over a dozen other states.
- Approach to mediation, conflict res, and problem-solving

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<ul style="list-style-type: none"> ○ Proposed conflict resolution process ● References: <ul style="list-style-type: none"> ○ MO RTF Project ○ VT digital services project ○ Many other independent review projects listed
2. Subcontractors
<ul style="list-style-type: none"> ● N/A
3. Project Team Organizational Chart
<ul style="list-style-type: none"> ● Laura Perez PM ● Steven Whitney lead Independent Reviewer ● Zeb Letourneau Independent Reviewer ● John Bermundez Business analyst ● Lauren McTear SME ● Robyn Hoffman SME
4. Litigation
<ul style="list-style-type: none"> ● Third party information security incident ● Employment litigation settlement ● No concerns overall
5. Financial Viability
<ul style="list-style-type: none"> ● No concerns

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> ○ Start with project work plan and hold initial project planning meeting with OBH project team (not DOJ?) <ul style="list-style-type: none"> ▪ Collaborate with OBH to structure project activities with the different stakeholders ○ Develop stakeholder register for engagement ○ Annually assess state's adherence to agreement <ul style="list-style-type: none"> ▪ Request relevant data ▪ Set up secure portal to upload documents ▪ 4 web surveys (families, school admins, providers, and clinicians) ○ Coordinate, schedule, and complete case reviews, through regular sample reviews and first-person interviews <ul style="list-style-type: none"> ▪ 33% of reviews through video conference for BHHs and CRCs

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<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Of the 33%, will randomly select 25% reviewed providers and cases to complete on-site and remote case reviews ○ Coordinate, schedule, and complete on-site inspections of programs <ul style="list-style-type: none"> ▪ Quarterly virtual meetings with care coordinators and regular staff ▪ Biannual in-person and virtual focus groups with families/children and natural supports ▪ Virtual focus groups with school admins, providers, and other stakeholders ▪ Trauma-informed approach ○ Semi-annual review reports review around workforce <ul style="list-style-type: none"> ▪ In-depth analysis to identify trends, gaps, and patterns ○ Provide comments on state's proposed training and curricula ○ Develop Comprehensive Annual Public Report <ul style="list-style-type: none"> ▪ Develop a deliverable expectations document ○ Annual compliance report ○ Building recommendations to improve policies, processes, and procedures ○ May submit up to three ad hoc analysis plans for implementation ○ Final Compliance Report
<ul style="list-style-type: none"> • Active listening, empathy, mediation, collaboration, and root cause analysis • Listening while maintaining focus on compliance with the agreement • Serve as an impartial facilitator • Partnered approach with the integration coordinator • Communication is transparent solution-focused and actionable. • Accept feedback from all stakeholders
<ul style="list-style-type: none"> • Ex parte comms with transparency, professionalism, and adherence to contractual and ethical obligations • Will establish clear protocols around ex parte communication
<ul style="list-style-type: none"> • Maintain detailed and documented recordings all of all findings, observations, and recommendations • Will meet with DHHS to conduct internal review of materials • Pre-testimony briefings
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> • Submission of a DED to OBH • Flexible and adaptable to changes in the implementation plan and compliance needs • Will include: <ul style="list-style-type: none"> ○ Data elements requested from the state

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC

DATE: 3/24/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> ○ Tool used for desk reviews and on-site inspections ○ Structure for quarterly virtual interviews ○ Structure for bi-annual focus groups ○ Diverse and comprehensive information collection and analysis techniques ○ Comms protocols ● Iterative review that allows for feedback and changes ● Will do a walkthrough of the draft ● Will pilot the plan by conducting one on-site test and then submit final deliverable
<ul style="list-style-type: none"> ● May submit ad-hoc analysis plans
<ul style="list-style-type: none"> ● 33% children's res care facilities for desk reviews ● 25% of desk review facilities for onsite ● Randomly selected additional facilities ● Random selection of cases for each on-site facility ● Remote case review when automated case management system, otherwise will review paper files when onsite ● Document how and if the state is complying with the terms ● Will also gather feedback from family, children, and natural supports, conduct quarterly virtual interviews with care coordinators, and conduct bi-annual focus group sessions
<ul style="list-style-type: none"> ● Prioritize efficiency, security, accuracy, and compliance for data pulls ● Will set up secure portal
<ul style="list-style-type: none"> ● Will ensure that OBH can be present during interviews
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> ● Will assess if implementation plan complies with the agreement
<ul style="list-style-type: none"> ● Will conduct trend analyses to assess workforce ● Assess licensure statistics ● Will review point-in-time unemployment statistics ● Can advise on emerging best practices nationally
<ul style="list-style-type: none"> ● Will review training policy and curricula, can draw on research and education center if needed
<ul style="list-style-type: none"> ● Will develop evaluation framework based on alignment with agreement ● Detailed analysis of all relevant policy documents ● Focus on clarity and comprehensiveness
<ul style="list-style-type: none"> ● Will review compliance at all times
<ul style="list-style-type: none"> ● Six core principles of trauma-informed care

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D. Budget
<ul style="list-style-type: none"> • Will provide detailed budget for any contract renewals at least 120 days before start of renewal period
E. Reports
<ul style="list-style-type: none"> • Will develop comprehensive annual public report • Systematic review of state's performance
<ul style="list-style-type: none"> • Will draft Final Compliance Report • Includes findings, observations, recommendations and other relevant information
<ul style="list-style-type: none"> • Develop a detailed Annual Compliance Report including <ul style="list-style-type: none"> ○ Findings and observations ○ Evaluation of state's progress in achieving or sustaining metrics ○ Clear details regarding compliance or non-compliance ○ Reporting on progress and pace toward compliance ○ Clear, actionable, and time-delimited recommendations to address compliance gaps ○ Annual updates about modifications needed to training policy or curricula ○ Outline of IR's review monitoring and upholding elements
<ul style="list-style-type: none"> • Draft Annual Compliance Report submitted to stakeholders for comment for 45 days before finalization
<ul style="list-style-type: none"> • Will make final compliance report available to comment from stakeholders 10 months prior to termination of agreement
<ul style="list-style-type: none"> • May submit up to three ad-hoc analysis plans
F. Experience and Qualifications
<ul style="list-style-type: none"> • Steven Whitney is a lawyer and will serve as lead and be dedicated to at least 50%
<ul style="list-style-type: none"> • Bidder provides list of relevant projects
G. Technical Assistance
<ul style="list-style-type: none"> • Ensure that they will provide TA
<ul style="list-style-type: none"> • Multidisciplinary team drawing on national experience • Will offer qualitative feedback reflecting the ten principles of wraparound and four key elements to assess service plans and reasonable modification processes
H. Confidentiality Requirements
<ul style="list-style-type: none"> • Complies with insurance requirements
<ul style="list-style-type: none"> • Uses secure file transfer systems, can lock down files on server, encryption

**STATE OF MAINE
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<ul style="list-style-type: none">• Uses information security management, risk assessment, and risk mitigation
<ul style="list-style-type: none">• Full disc encryption
I. Reports
<ul style="list-style-type: none">• Will produce all required reports
<ul style="list-style-type: none">• Will produce all required reports within the timeline
2. Staffing
<ul style="list-style-type: none">• Staffing proposal appear qualified and appropriate• No subcontractors• Staffing and staff hours appear appropriate and reasonable. Most amount of hours for lead IR and IR, with support project management and BA
3. Implementation - Work Plan
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC
DATE: 3/23/25
EVALUATOR NAME: Kristen McAuley
EVALUATOR DEPARTMENT: Maine DHHS / OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Multiple projects listed with specific timelines, which in total meet the 8 year threshold. Projects include community-based BH services, BH / SUD / ID services, juvenile detention, H&CBS – including in a remote area, Medicaid, child welfare services, juvenile justice, and RFT care. Not direct provision of services, examples are in the areas of experiencing evaluating / auditing / etc.• Q – Notes that the examples are provided for the “proposed project team” – will be good to understand constitution of team and specific experience on listed projects by team individuals.• P – Multiple, pertinent projects (meet eligibility threshold) with a variety of types of data analysis / compliance, including cost and billing data, file / case audit, and qualitative data.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – History of service state agencies. 39 years experience of team working with HHS agencies review approach. Note familiarity with ambitious timelines, modernizing programs. Note impartiality.• I – Unsure why more than two examples provided in brief. Many examples are pertinent or adjacent to the IR role, though not in the provision of services but demonstrate expertise in services.• P – Highlight collaboration with CMS, monitoring of regulatory environment.• N – Examples include working with disability service providers (p.10-11), no examples included individuals with disabilities or advocacy organizations.• P – Note pertinent members of team and how their experience could be applied to this service.• Q – Unclear if intent of mediation response considers the nature of the relationship across parties of the Agreement, and doesn’t articulate depth of approach.• N – Listed projects aren’t a precise fit / alignment.
2. Subcontractors
<ul style="list-style-type: none">• No subs used.
3. Project Team Organizational Chart
<ul style="list-style-type: none">• P - Org chart included, with line re: reporting.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC
DATE: 3/23/25
EVALUATOR NAME: McAuley
EVALUATOR DEPARTMENT: Maine DHHS / OBH

4. Litigation
<ul style="list-style-type: none"> • Litigation Form included.
5. Financial Viability
<ul style="list-style-type: none"> • Information included (marked confidential).

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • N – Does not follow the A.1.a-c outline. Notes first focus on plan buildout, then IR role and authority. • N – Focus is on OBH, appropriately, but does not consider DOJ as a party to the Agreement or address the dynamic of other entities that are part of upholding the Agreement. • P – Articulate structuring activities in a way that minimizes disruption, develops a stakeholder registry for engagement • Q – Not focus on BHH and CRCF (p.4) as part of comprehensive review, unsure if this will be totality.
<ul style="list-style-type: none"> • P – Highlight active listening, engagement with IC, focus on root causes.
<ul style="list-style-type: none"> • P – Note development of clear protocols for partner engagement for structured communication.
<ul style="list-style-type: none"> • N – Focus is on OBH and isn’t sensitive to the dynamic of other entities under the Agreement.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P – Note engagement with partners to incorporate diverse perspectives. • P – Plan will include requested / necessary data elements, tools and structures used, structure for how process will be built out, etc. Appreciate acknowledgement re: needing to pivot / adjust as progress occurs.
<ul style="list-style-type: none"> • Acknowledged that will submit any plans to OBH.
<ul style="list-style-type: none"> • Q – Noted focus on CRCF / out-of-home care (including higher risk facilities), uncertain about focus on transitions. • P – Note other forms of data collecting, including feedback from families / children, interviews with care coordinators, and focus groups.
<ul style="list-style-type: none"> • Acknowledged that pertinent individuals will be provided with notice.
C. Additional Requirements
<ul style="list-style-type: none"> • Q – Uncertain about any engagement with the U.S.

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DATE: 3/23/25

EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none"> • I – Note that will undertake trend analysis on workforce independent of information submitted by OBH.
<ul style="list-style-type: none"> • I - Acknowledge that will review and can draw upon Research and Education Center if needed.
<ul style="list-style-type: none"> • N – Not detailed, more of a high level approach.
<ul style="list-style-type: none"> • N – More of an acknowledgement than a detailed description.
<ul style="list-style-type: none"> • P – Draws upon the Six Core principles of TIC via SAMHSA.
<p>D. Budget</p>
<ul style="list-style-type: none"> • Confirmation that budget will be provided in timeline stated.
<p>E. Reports</p>
<ul style="list-style-type: none"> • P – Note systemic review, highlight overarching framework, clearly articulate particular benchmarks of the Agreement.
<ul style="list-style-type: none"> • N – Not detailed, especially for what would otherwise be a final report to a Settlement Agreement.
<ul style="list-style-type: none"> • P – Detailed, clear, and comprehensive.
<ul style="list-style-type: none"> • P – Acknowledge timelines for report drafting and feedback.
<ul style="list-style-type: none"> • Q – Seems pertinent to the final compliance report, not annual reports.
<ul style="list-style-type: none"> • P – Acknowledge process but doesn't acknowledge other Parties to the Agreement.
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • P – Name lead, who will dedicate 50% of time to project. Pertinent professional background and experience. Further detail provided in subsequent section.
<ul style="list-style-type: none"> • P/N – Extensive list provided, though not all examples are in total alignment for the particular areas of expertise listed and not called out or aligned with the a-e of experience of interest.
<p>G. Technical Assistance</p>
<ul style="list-style-type: none"> • P/N – Appropriately aligns with when TA would be provided, but is unclear how TA would be provided or the details under these circumstances.
<ul style="list-style-type: none"> • P – Note multidisciplinary, in-house expertise. Use PDSA cycles as possible example for QI. Highlight the ten principles of wraparound process.
<p>H. Confidentiality Requirements</p>
<ul style="list-style-type: none"> • Acknowledgement of requirements.
<ul style="list-style-type: none"> • P – Includes details of systems / processes used.
<ul style="list-style-type: none"> • P – Includes extensive details of systems, processes, and personnel – all across multiple domains.
<p>I. Reports</p>

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EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none">• P – Detailed and pertinent description of report preparation, processes and components of reports.• P – Summary of AMP highlights incorporating diverse perspectives, methodology that aligns with requirements, process and outcome components, etc. Well-articulated summary.
<ul style="list-style-type: none">• P – Similarly, nicely articulated summary with pertinent details.
2. Staffing
<ul style="list-style-type: none">• P – Key qualifications and responsibilities outlined in chart (s.p.28).• N – Individual resumes included, though noted not to adhere. Overall formatting not necessarily aligned with what was articulated/expected in RFP, though pertinent information is still included in the narrative.• No subcontractors utilized.• P – Clear time allocation included. Not clear if Attachment 7 is included?
3. Implementation - Work Plan
<ul style="list-style-type: none">• P – Format and task outline are clearly articulated.• P/N – Appreciate some deliverables, including a stakeholder registry. Unclear if others are as appropriate, including web surveys. Timeline for first compliance report seems to be at the six month(ish) mark and not after the first 18 months. Some pieces and elements don't precisely align with Agreement.• Q – Unclear if staffing hours correlate to division of responsibilities. Steven is listed as Lead IR but lead role is unclear specific to how tasks / deliverables are outlined in plan.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC
DATE: 23MAR2025
EVALUATOR NAME: Sara Olsen
EVALUATOR DEPARTMENT: DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P - Demonstrated 8 years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, specifically in the administration, funding, and delivery of such services. Described 8 years of experience in program evaluation related to Community-Based Services for Children with Behavioral Health Disabilities.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P - Experience facilitating stakeholder engagement and community-based services needs assessment, albeit in adult serving systems• N - Projects focus on cost cutting and cost analysis rather than service delivery or administration or analysis of such• P - Multiple projects in states with similar population sizes and percent rural areas as ME• N - Past performance unrelated to community-based services for children with behavioral health disabilities• N - Knowledge, experience, and familiarity with Medicaid rules and requirements, especially as how they may apply to administration of services not demonstrated.
2. Subcontractors
<ul style="list-style-type: none">• P
3. Project Team Organizational Chart
<ul style="list-style-type: none">• Q - Two personnel on the team are listed as SMEs. What is their subject matter?
4. Litigation
<ul style="list-style-type: none">• P - No substantive concerns raised through current litigation
5. Financial Viability
<ul style="list-style-type: none">• P - No issue with the framing of balance sheets
Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC

DATE: 23MAR2025

EVALUATOR NAME: Sara Olsen

EVALUATOR DEPARTMENT: DOJ

<ul style="list-style-type: none"> • P – integration of stakeholder experiences in evaluation; • P – description of performance indicator examples; • N – repeat of RFP language without specifics; • N – reliance on national benchmarks for evaluation rather than Agreement benchmarks
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • N – overemphasis on CRCFs and residential site inspections • N – overemphasis on CRCFs and residential site inspections
C. Additional Requirements
<ul style="list-style-type: none"> • P – identifying national best practices
D. Budget
<ul style="list-style-type: none"> • P
E. Reports
<ul style="list-style-type: none"> • P
F. Experience and Qualifications
<ul style="list-style-type: none"> • N – referenced Section II with no further detail, • Q from Section II remains • P/N – repeat of project in Section II with same comments
G. Technical Assistance
<ul style="list-style-type: none"> • N – technical assistance described does not indicate knowledge of best practices to ensure Informed Choice that would be required to perform this task
H. Confidentiality Requirements
<ul style="list-style-type: none"> • P
I. Reports
<ul style="list-style-type: none"> • P
2. Staffing
<ul style="list-style-type: none"> • P – detailed description of staffing hours, roles, and expertise; • N – no one with expertise in community-based services, specifically those for children with mental health disabilities • Q from Sec II answered in a.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • P

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC
DATE: 3/25/25
EVALUATOR NAME: Nonny Onyekweli George
EVALUATOR DEPARTMENT: US DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none"> • Seems to be yes • 8+ years of experience in administration

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Q: IT System modernization • P: Alexandria, VA experience • Q: RTFs in Missouri and • P: assessment of ND's HCBS provider workforce training • P: experience assessing • P: experience working with State data • Q: experience transitioning individuals from facilities to communities • P/N: substantial experience ensuring individuals with disabilities have necessary services • Q: Conflict resolution (p.15/14) – project principals role
2. Subcontractors
<ul style="list-style-type: none"> • No subcontractors
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Q: direct experience transitioning
4. Litigation
<ul style="list-style-type: none"> • P: sufficient response
5. Financial Viability
<ul style="list-style-type: none"> • P: sufficient response

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> • P: Desk reviews of 33% then on site review of 25% p. 6 • P: problem solving approach- active listening; incorporating coordinator p.9 • P: understanding on coping state counsel when appropriate p. 9
B. Assessment Methodology Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 3/25/25

EVALUATOR NAME: Nonny Onyekweli George

EVALUATOR DEPARTMENT: US DOJ

<ul style="list-style-type: none">• Q: Assessing facilities p. 10
<ul style="list-style-type: none">• P: interactions with state employees should include the state
C. Additional Requirements
<ul style="list-style-type: none">• Q: Steve Whitney with experience conducting reviews of RTF
<ul style="list-style-type: none">• Q: Julie Sullivan v. Whitney- lead v. principal
<ul style="list-style-type: none">• P: ties the roles and breakdown to SA
<ul style="list-style-type: none">• Q: present projects for lead p.66; experiences more institution focuses
D. Budget
<ul style="list-style-type: none">• P: Sufficient
E. Reports
<ul style="list-style-type: none">• P: substantial detail in the reports
<ul style="list-style-type: none">• Q: great project management skills but what about subject matter expertise
F. Experience and Qualifications
<ul style="list-style-type: none">• P: organization has substantial experience
<ul style="list-style-type: none">• Q: uncertain whether it is with transitions to community
G. Technical Assistance
<ul style="list-style-type: none">• P: adequate
<ul style="list-style-type: none">• Q: unclear subject matter expertise
H. Confidentiality Requirements
<ul style="list-style-type: none">• P: sufficient
I. Reports
<ul style="list-style-type: none">• P: includes detailed actions that will be taken to prepare report
2. Staffing
<ul style="list-style-type: none">• P: robust staff
3. Implementation - Work Plan
<ul style="list-style-type: none">• P: sufficiently detailed; includes names of individuals working on each section
<ul style="list-style-type: none">• P: includes details such as "develop agenda"

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC
DATE: 3/20/2025, 3/21/2025, 3/24/25
EVALUATOR NAME: Victoria Thomas
EVALUATOR DEPARTMENT: USDOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• N – focus of experience description is on cost of services and the goal to “increase revenues” which is not relevant to the Independent Reviewer role.• N – limited discussion about transitions to community-based services from out-of-home placements• N – lack of references to provision of home and community-based services for children with behavioral health disabilities• N – lack of discussion of qualitative reviews or interviews with children/families/individuals with disabilities. Discussed methodologies were focused on talking to professionals and conducting financial analyses.• Demonstrated sufficient years of experience in community-based services• P – has rural Maine experience.• P – has juvenile justice experience related to diversion• Q – reference to 2021-22 project related to Residential Treatment Facilities that mentioned evaluating case management – unclear to what extent transitions from the RTFs to the community were part of this. Appears to be primarily a review of adult Out-of-Home services.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• N – pg 14 of the PDF describes review of Residential Treatment Facility services as similar to the work the IR will be doing. Concerned that they do not understand that the IR’s work will be helping the State transform away from RTF style services to instead provide services to children in family homes.• P – experience working with different states on Medicaid long-term care services• P – Experience with auditing juvenile justice diversion services.• N - But focused on financial analysis.• P – experience child welfare services• N – again focus appeared limited to economic models• N – several projects were focused on review of residential facilities• P – experience analyzing a community-based beh health services clinic model for children on Medicaid.

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DATE: 3/20/2025, 3/21/2025, 3/24/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – experience related to development of a rapid access to behavioral health care model. • P – experience helping identify enhanced federal match services for home and community-based service improvements • P – community workforce development projects • Q – lead reviewer will be an attorney. Describes his experience with Residential Treatment Facilities. Concerned this is the wrong expertise – an institutional focus. • N – description of two relevant projects at pg. 16 of PDF was about Residential Treatment Facilities. This institutional focus is not the most relevant or helpful. Second project description lacked any specifics about children’s community-based behavioral health services.
2. Subcontractors
<ul style="list-style-type: none"> • N/a
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • 8 individuals.
4. Litigation
<ul style="list-style-type: none"> • Information security litigation resulted in settlement against entity; employment case that settled.
5. Financial Viability
<ul style="list-style-type: none"> • Annual revenue appears to exceed debts.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • Neutral - Collaborate with the Parties, gather, analyze and report on info and data re: the State’s progress in complying with all sections of the Agreement. • N – assessment plans only discuss facility-based providers • N – no mention of DOJ • N – says will meet with DHHS to internally review any materials prior to testifying. Does not seem to understand neutral/independent role of independent reviewer.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • Q - do they understand that a big piece of this will be community-based providers? Do they think facility-based providers are “community-based”?

**STATE OF MAINE
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DATE: 3/20/2025, 3/21/2025, 3/24/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • N – the reference to children living in family homes appears cut and pasted from the agreement – otherwise no discussion of children living in family homes, they central goal of the agreement.
<ul style="list-style-type: none"> • P – they put forth action steps and note the required timelines in the agreement
<ul style="list-style-type: none"> • N – reference that they will be looking at residential facility quality of care. That is not within the scope of the agreement.
<ul style="list-style-type: none"> • P – understanding of trauma informed care • N – description of assessment does not seem grounded in any specifics about system transformation from institutional services to children being able to remain in family homes long-term.
C. Additional Requirements
<ul style="list-style-type: none"> • P – reference to Wraparound principles and Wraparound four key elements
<ul style="list-style-type: none"> • Neutral to Negative – trend analyses and licensure statistics to measure workforce – not sure this is the most effective path.
<ul style="list-style-type: none"> • Neutral – essentially restates requirement
<ul style="list-style-type: none"> • Positive to neutral – states requirements with addition that they will identify strengths, gaps, and opportunities for improvement
<ul style="list-style-type: none"> • Neutral – restates requirement
<ul style="list-style-type: none"> • Positive – demonstrates understanding of trauma informed care
D. Budget
<ul style="list-style-type: none"> • Neutral – will provide detailed budget.
E. Reports
<ul style="list-style-type: none"> • Neutral - Plans for reporting are adequate
<ul style="list-style-type: none"> • N – does not seem to understand that both DOJ and State can provide comments on report nor independence of reviewer
<ul style="list-style-type: none"> • N – does not seem to understand that both DOJ and State can provide comments on report nor independent of reviewer
<ul style="list-style-type: none"> • Neutral to negative – plans appear adequate but does not recognize DOJ/independent of reviewer
<ul style="list-style-type: none"> • Neutral to negative – plans appear adequate but does not recognize DOJ/independent of reviewer
<ul style="list-style-type: none"> • Positive – offers to do up to three ad-hoc analysis plans
F. Experience and Qualifications
<ul style="list-style-type: none"> • See above
G. Technical Assistance
<ul style="list-style-type: none"> • Neutral – states requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Berry, Dunn, McNeil & Parker, LLC

DATE: 3/20/2025, 3/21/2025, 3/24/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none">• Neutral to positive – states requirements, also lists additional wraparound concepts not found in agreement
H. Confidentiality Requirements
<ul style="list-style-type: none">• Procedures seem adequate
I. Reports
<ul style="list-style-type: none">• N – says will consult with “OBH-identified stakeholders.” Would be preferable for Independent Reviewer to be able to identify stakeholders independently.
2. Staffing
<ul style="list-style-type: none">• project lead – focused on legal compliance, cost, and residential treatment facilities. N – does not list any experience with transitioning children with beh health disabilities from out-of-home placements to family homes; nor system transformation away from residential facilities to family homes. Has experience with analyzing funding of related services.• Additional staff – has developmental disabilities care manager experience. Otherwise mostly project management/healthcare experience• Additional staff – high level administrative experience but not directly relevant• Additional staff – financial management and project management background• Additional staff – community outreach, business analysis• Additional staff – background in public benefits• Additional staff – background with Medicaid programs for children with special healthcare needs and ambulatory care settings
3. Implementation - Work Plan
<ul style="list-style-type: none">• N – no mention of DOJ• Q – how will they maintain independence?• P – detailed, seems to list requirements of agreement• N – to the extent there is detail beyond what is in the agreement is it not clear it is based on transforming Maine’s system• Q – still unclear whether they understand the goal of the agreement (to transform Maine’s system so children do not have to be unnecessarily in out-of-home placements) nor the role of the independent reviewer.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 3/23/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Bidder has 25 years experience in the delivery of clinical services, including supervisory and administrative work with juvenile justice services. She also has experience developing High Fidelity Wraparound curriculum and experience in regulatory oversight for state of New Mexico.• P – Bidder has developed, implemented and scaled numerous behavioral health programs requiring significant multi-systems collaboration and stakeholder engagement.• P – Bidder has 15 years of Quality Services Review, including training and mentoring new reviewers.• P – bidder noted they are a national expert in systems of care, high fidelity wraparound, rural, frontier, and urban settings, and experience with multisystem involved youth, including juvenile justice and child welfare.• I – Bidder notes her experience in program evaluation in the context of other roles, but also mentions a separate entity (Janus LLC team) as bringing 30 years of research, CQI, program evaluation and compliance monitoring (auditing) in child welfare, behavioral health, developmental services and special education.• P – Bidder noted she was the principal evaluator of six SAMHSA grants, including both process and outcomes measures. Noted Quality Services Review as primary evaluation method.• I - Noted program evaluation and licensing, audits and investigations as part of their role of director of behavioral health.• I – Noted de-institutionalization efforts with partnerships with MCOs, advocacy groups, and SMA.• N – lack of attention to detail – supplying answers to Q3-4 twice.

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – Bidder noted team members involved in the proposal and their relevant experience/qualifications.• N – Bidder did not name an individual who will be the project manager/junior data analyst, nor share their plan to secure this role (it is later noted in Part 3 that they have a person selected and ready to begin upon award).

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EVALUATOR DEPARTMENT: DHHS/OBH

- P - Bidder noted team members have experience with Medicaid state plan, waiver services, EPSDT, billing and policy development, rate setting for EBPs, etc.
- I – Bidder made a statement on Maine’s use of Bright Futures guidelines “and encourages medical professionals to comply” with EPSDT and stated its imperative medical providers are enrolled. This implies some level of working knowledge of Maine’s system this is a potential remedy for children under the Agreement.
- I – The Bidder has noted an understanding that Maine has aligned its strategic priorities with that of the Settlement Agreement, and also suggested ways to explore data to inform needs of the population served that could lead to future value-based contracts. Bidder also noted incentivizing Hi-Fi Wrap to serve youth in their home and communities rather than congregate or residential treatment settings.
- P – Bidder noted and provided examples of working with disability providers and advocacy organizations, including work on a Settlement Agreement in Hawaii.
- P – Bidder supplied two related projects for this work. Of note, one (Kevin S) was directly related to finalization and implementation of a Settlement Agreement in New Mexico, including development of and implementation of evaluation plans, noting familiarity with litigation driven reform efforts.
- P – noted New Mexico work included contracting to develop a suite of quality monitoring and qualitative review tools, which could be available to Maine.

2. Subcontractors

- I – Bidder notes subcontract with Child Welfare Policy and Practice Group (CWG) and noted an affiliated consultant as part of the proposed Janus team.
- I – Janus and CWG is noted to have a 20 year history of collaboration and supporting projects.

3. Project Team Organizational Chart

- P - Org chart attached as Appendix 3, noting 5 roles, which seem relevant to the work.
- I – While four roles have individuals identified, the Project Manager/Junior Analyst has yet to be determined.
- P – Resumes of known team members attached and show extensive history of relevant experience.

4. Litigation

- P – no past litigation, claims, or settlements.

5. Financial Viability

**STATE OF MAINE
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DATE: 3/23/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

- I – no audited statements supplied or balance sheet.
- I – 4 years of profit and loss statements provided, showing annual swings in gross revenue (511k in 2021, 79k in 2022, 170k in 2023, 24k in 2024). With these significant swings, some years (2022 and 2024) noted operational losses.
- N – no additional statements or letters of support from Banks, creditors, etc. noting financial viability and good standing of the organization.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P – bidder’s drill down is logical, guiding principles are sound, landscape analysis, quantitative analysis, feedback surveys and focus groups all make sense to lead toward understanding system performance and insights on impacts to youth and families. • N – bidder incorrect refers to Integration Coordinator as “Interagency Coordinator” throughout the proposal. I – Unclear how the development of the Local Leadership Team and assumed authority there-in as described in the agreement comports with state protocol for planning, review, and recommendation generation. Is this the right structure for Maine to accomplish this work? Is this the role of the IR to establish? • Q – initial set of indicators is helpful and show the bidder did some pre-work thinking about how to design the work, but its unclear why there is such a strong focus on child welfare involved youth, who are not the specific focus of the agreement. Also unsure of what they mean by placement types and what they envision to review i.e. all youth living with resource parents and their trends?
<ul style="list-style-type: none"> • I – Bidder suggests creation of local leadership team composed of the parties and “key stakeholders, community representatives, and advocates.”
<ul style="list-style-type: none"> • I – Bidder notes process and outcomes measures would be requested – need to assure this aligns with Settlement Agreement benchmarks and reporting.
<ul style="list-style-type: none"> • I – Bidder noting reviewing the complaint and settlement agreement, proposing initial indicators, which were heavily focused on children in custody and status of placements beyond those that are behavioral health focused – which could extend beyond the scope of the Agreement.
<ul style="list-style-type: none"> • P – Bidder notes conflict resolution strategies focusing on shared decision-making, recognizing compromise, being a neutral party to resolve differing

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<p>perspectives and using shared values/goals and data as appropriate to come to a resolution.</p>
<ul style="list-style-type: none"> • P – Noted regular check-ins with Integration Coordinator and the legal parties to also use collaborative problem solving, and committed to effective communication across differences.
<ul style="list-style-type: none"> • P – Noted ex-parte communication will be transparent and inclusive of all relevant parties, whenever possible.
<ul style="list-style-type: none"> • N – Bidder did not address how they will testify in any case between the parties relating to implementation, enforcement, or dissolution of the agreement.
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> • P – bidder noted will work with the parties, understand quantitative reports and minimum data sets to review the implementation and develop the methodology plan within 45 days.
<ul style="list-style-type: none"> • P – Bidder noted willingness to identify and develop any agreed upon adhoc reports and work with the team to identify data sources, timeframes, codes, etc. and evaluate how best to complete.
<ul style="list-style-type: none"> • P – Bidder described a framework to their evaluation approach including local leadership teams, landscape analysis, quantitative analysis on experience of services, survey feedback, focus groups, and QSR review. • Q – how are the 20 youth chosen for the QSR? How will the Bidder attend Child and Family Team Meetings.
<ul style="list-style-type: none"> • P – Bidder notes experience in working with administrative data sets, clearing and sorting data necessary for analysis, and noted working on ‘Best fit’ for data that may not be available.
<ul style="list-style-type: none"> • P – bidder noted understanding of need for objectivity and transparency and noted lists of state staff or other key stakeholders for interviews will be made available in advance for review. • I – bidder noted potential for imbalances of power if leadership/state counsel is present, and said they would work with the IC to determine when/if interviews can occur without them present. It is unclear how this aligns with the Settlement Agreement and duties of the IR and IC. Care must also be taken to consider rights of employees for representation. • P – Bidder noted willingness to work with the state on potential for written transcripts.
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • I – bidder assured will provide comments with in 30 days and will work with the IC on the best method to relay those comments.

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<ul style="list-style-type: none"> • I – bidder assures review will be completed in the timeframe, assuring comments are contextualized.
<ul style="list-style-type: none"> • I – bidder assures review will be done in the timeframe
<ul style="list-style-type: none"> • P – Bidder notes assuring policy review and offering comment to the state within the scope of their role as IR. • I – Bidder made reference to reviewing draft policy for input and feedback as consultation to implementation. • I – Bidder noted they are available to Maine for consultation to support policy, process and procedural development and implementation.
<ul style="list-style-type: none"> • P – Bidder noted developing baseline processes and outcome measures with regular required reporting is designed to support the multi-method inquiry approach to review compliance at any time.
<ul style="list-style-type: none"> • P – bidder noted being committed to trauma informed practices being embedded in how they operate, supporting informed choice, transparency, strengths based and person centered.
<p>D. Budget</p>
<ul style="list-style-type: none"> • I – bidder noted cost breakdown will not exceed specified cap of \$900k over 3 years and noted years 2 and 3 budgets will be negotiated in contract renewals.
<p>E. Reports</p>
<ul style="list-style-type: none"> • Bidder notes that public reports will include recommendations on how to advance the system of care, which they note will be vetted by the local leadership team for input and feedback. It is unclear how this process will consider or not the implementation plan, state approval processes, the state budgeting process, and other state constructs, and how bidding these recommendations will be considered for future action. • P – Bidder notes a potential schedule of annual reporting with exact dates to be negotiated, submitted to the parties for review 45 days prior to due date, with 30 days for review. • P – Bidder noted working with the IC on further sharing the report after dissemination to the parties.
<ul style="list-style-type: none"> • I – Bidder noted they will ensure a final report 9 months prior to termination date of the agreement.
<ul style="list-style-type: none"> • I – Bidder noted will ensure reports have a comprehensive evaluation of state progress on performance measures.
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • P – bidder lays out experience and qualifications of all staff for the roles envisioned, and noted that a project manager will be established upon award.

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<ul style="list-style-type: none">• I – Bidder noted Pittenger has allocated 60% of their time for this project, but in the staffing plan (page 38) noted 55%. There are also small discrepancies under 1a/b and the staffing plan for other roles as well.
<ul style="list-style-type: none">• P - 2a-3 appear to be adequately addressed through a combination of narrative and individual resumes.
G. Technical Assistance
<ol style="list-style-type: none">1. I – Bidder noted they are highly experienced TA consultants and will work with the IC and Local Leadership Team on TA efforts, which will be data informed.
<ol style="list-style-type: none">2. P – Bidder noted PDSA approach along with a framework on Content, Process, and Relationships. I – Bidder noted that if TA need exceeds their resources to provide, they will work with the parties to explore additional consulting support.
H. Confidentiality Requirements
<ol style="list-style-type: none">1. I – bidder notes they already maintain professional and general liability insurance, and could obtain anything else required by Maine IT.
<ol style="list-style-type: none">2. I – bidder provided assurances of data security for transfer of data and holding of data leveraging best practices. Noting that any data shared is de-identified and aggregated.
<ol style="list-style-type: none">3. I – bidder notes they comply with state and federal laws. In the event of a disclosure, they will bring it to the IC’s attention and work in close cooperation with the state.
<ol style="list-style-type: none">4. I – Bidder noted they comply with all confidentiality requirements on IT-Service Contract, Rider B-IT, Section 19, RA-1 and RA-5.
I. Reports
<ol style="list-style-type: none">1. P – Bidder noted upon award will develop a project plan and master calendar that identifies reports or other deliverables noted. Noted it will be reviewed in weekly team meetings, then will develop a monthly status report with the IC. I – Bidder noted that immediately following award they will hire a project manager who will actively manage the project plan and master calendar to ensure timely delivery.
<ol style="list-style-type: none">2. I – bidder noted plan in I-1 and also said work plan and staffing plan developed at a level of resourcing adequate to meet the deliverables.
2. Staffing
<ol style="list-style-type: none">a. Job descriptions supplied and appear relevant to the various roles envisioned by the bidder.b. Noted subcontractor role will be to complete the QSR and child and family team/service planning reviews.

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- c. I - Staffing plan included, as noted earlier, FTE percentages do not match what was noted earlier in the application.

3. Implementation - Work Plan

- a. N - Workplan (GANTT Chart) supplied as Appendix but the plan was pasted in a way that was not easily followable for year 1 Q4, and years 2 and 3.
P – Workplan description is logical and makes sense to support the first year, establishing the IR, reviewing implementation plan, developing and implementing the assessment methodology plan, etc.
I – Proposed frequency of collaboration initially makes sense, but a question on if the Local Leadership Team is the right structure for Maine given the questions noted previously.

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BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 3/24/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• 25 years experience in behavioral health services, mostly responsible for administering programs• Consulting from 2023-2025• Involved with settlement agreement for behavioral health and child welfare services• Small team of associates and subcontractor for child welfare practice and policy• Appears to meet eligibility
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Statement of Qualifications and History of Bidder's work<ul style="list-style-type: none">○ Pittenger has 25 years of experience across behavioral health in a variety of settings rural and urban○ Experience in direct clinical service, management and supervision of clinical programs, service dev and implementation, strategic planning and fiscal mgmt., training and staff dev, and oversight and senior leadership of a behavioral health state agency○ Gibbons has more than 25 years in implementing measurable outcomes in human service orgs and systems<ul style="list-style-type: none">▪ Experience in qualitative program eval○ Claps has 2 decades of experience in youth and family outcomes in child welfare, mental health, and DD services<ul style="list-style-type: none">▪ Developed suite of qualitative and practice tools for NM lawsuit focusing on child welfare and behavioral health services○ Roller-White has 25 years experience<ul style="list-style-type: none">▪ Evaluation projects across US primarily focused on child welfare• Bidder's knowledge and experience with Medicaid, EPSDT, etc<ul style="list-style-type: none">○ Amended NM's state plan and a delegated integrated care coordination model○ Familiar with Medicaid's community-based services○ Served as an SME with a Medicaid state agency on a project similar to Maine's Settlement agreement○ Understands EPSDT model

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EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

- Applying knowledge to RFP and Agreement
 - SME's across the continuum of care
 - Understands the closed loop referral system
- Work directly with providers and advocacy orgs:
 - Facilitated disability rights investigation into large RTF which led to its closure and transition to community supports
 - On board of NM center for DD
 - Expedited children involved in CW system to receive home and community based waiver-funded services to reduce res and congregate care settings
- Experience applying to deliverables and activities
 - Experience can rapidly gain insights and understanding of Maine's system
 - Inform potential strategies to advance Maine's envisioned system of care
 - Could leverage centers of excellence for disabilities
- Mediation and conflict resolution
 - Negotiated a settlement agreement in another state similar to Maine's agreement
 - Experiencing working as federal court monitors overseeing consent decrees
 - Senior leadership roles in state government
 - All team members have experience navigating the complexities and considerations of evaluating, monitoring and implementing settlement agreements and consent decrees
- Two projects:
 - Kevin S Settlement Negotiations and Implementation
 - Led two of the four sections
 - NM Center of Innovation – quality services review
 - Working relationship between Pittenger and COI which assisted in implementation of children's behavioral health systems

2. Subcontractors

- Child Welfare Policy and Practice Group
 - Conduced program evals of comprehensive needs assessments of CW and BH systems in many states
 - Served in federal court monitoring role in multiple jurisdictions

3. Project Team Organizational Chart

- 5 members, all look strong and qualified

4. Litigation

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EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> No reported litigation
5. Financial Viability
<ul style="list-style-type: none"> Seems to be operating at tight margins

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> Proposes an integrated and iterative mixed-method approach to assess Maine's status <ul style="list-style-type: none"> Formative and process evaluation activities at onset to inform subsequent qualitative assessment activities throughout Will conduct Quality Service Reviews and qualitative case-based point-in-time methodology Process and outcome measures would be requested to monitor progress Initial data collection to determine baseline <i>Proposed an initial set of indicators for consideration by the parties based on the available information</i>
<ul style="list-style-type: none"> Experience in litigation-driven contexts in CW and BH Facilitation of shared decision-making, shared commitment to systems change and aligning values Regular check-ins with integration coordinator
<ul style="list-style-type: none"> Committed to neutrality in ex parte comms
<ul style="list-style-type: none"> Creation of work plan and schedule Monthly status report will give detail to accomplishments, barriers, and problem-solving efforts
B. Assessment Methodology Plan
<ul style="list-style-type: none"> Plan created in response to the finalized implementation plan by the State Will define evaluation methodologies and list key data elements to be obtained Will provide recommended assessment methodology plan within 45 days for review
<ul style="list-style-type: none"> Mutual agreement on any ad hoc reports Time from the team is scoped to support routine data queries and ad hoc reviews If too big of scope, will work with the parties on how best to complete
<ul style="list-style-type: none"> Believes to build capacity and resource availability of the system of care to improve practice that leads to better outcomes

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<ul style="list-style-type: none"> • Mix of quantitative and qualitative measures to monitor how the system, practice and outcomes are improving • Establish a local leadership team to provide strategic guidance • Completion of landscape analysis within first two months • Quantitative analysis of experience of youth and families receiving services • Survey feedback from youth and families, community partners, and DHHS staff • Focus groups and stakeholder interviews • Quality Services Reviews of 20 youth receiving services from DHHS • Additional case reviews assessing the quality of child and family team meetings and ISPs
<ul style="list-style-type: none"> • Data Eval Lead Roller-White has significant experience • Relationships with Roller-White and key data admins • Use of secure data exchange processes • If data isn't perfect, will get "best fit data" to gain insight
<ul style="list-style-type: none"> • Aware of the power imbalance between staff, leadership, and counsel
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • Complete review within 30 days of receipt
<ul style="list-style-type: none"> • Will complete review and offer comments of semi-annual reports regarding reporting and analysis on workforce shortages
<ul style="list-style-type: none"> • Will review and offer comments on training and curricula
<ul style="list-style-type: none"> • Review of policy, processes and methodologies are included as part of the eval methodology. Will coordinate with the coordinator on new policy/process/procedure. Will review existing statutes and rules as part of landscape analysis
<ul style="list-style-type: none"> • Cadence of reporting is primary conduit for summary status
<ul style="list-style-type: none"> • Long history of trauma-informed engagement
<p>D. Budget</p>
<ul style="list-style-type: none"> • Will stay within budget cap
<p>E. Reports</p>
<ul style="list-style-type: none"> • Annual report will state where state is compliance and where it is progressing to compliance. Recommendations for how to advance the system of care
<ul style="list-style-type: none"> • Final report will state the compliance status
<ul style="list-style-type: none"> • Reports will include comprehensive eval of state's progress. And pace and progress for obtaining compliance. Will offer recommendations for facilitating and sustaining compliance.
<ul style="list-style-type: none"> • Will provide drafts within timeframes
<ul style="list-style-type: none"> • Will provide final report within timeframes

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EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> Ideas for ad hoc reports such as a summary report from the QSR process. Will work within capacity and budget to create or prioritize any ad hoc report
F. Experience and Qualifications
<ul style="list-style-type: none"> Pittenger the Lead and will service .6FTE Others will serve between .25 and .5 FTE Roller-White in more of a consulting capacity to provide quant and qual analytical support
<ul style="list-style-type: none"> Pittenger has background in Medicaid-community based services and provision of community based mental health services for children, and working with public agencies on implementation Combined brings all the experience in the requirements
G. Technical Assistance
<ul style="list-style-type: none"> Pittenger, Janus and CWPG are highly experienced in TA for states on their behavioral health and CW systems
<ul style="list-style-type: none"> Highly experienced in TA and CQI processes and methods Three part framework for TA – content, process, and relationships
H. Confidentiality Requirements
<ul style="list-style-type: none"> Prime and sub have insurance, can get more if needed
<ul style="list-style-type: none"> Best practices in protecting information. De-identify data in certain settings.
<ul style="list-style-type: none"> Complies will all state and fed law around protection of confidential information
<ul style="list-style-type: none"> Any non-public information will be confidential
I. Reports
<ul style="list-style-type: none"> Will develop a project plan and master calendar to identify reports and other deliverables. Monthly status report template. Will add a PM to the team to manage plan and calendar (to be hired if awarded)
<ul style="list-style-type: none"> Same as above to meet requirements
2. Staffing
<ul style="list-style-type: none"> Resumes listed as attachments all appear well qualified CWPG already identified as a sub, worked together for 20 years. Additional staffing support can be brought on through CWG. Staffing plan attached
3. Implementation - Work Plan
<ul style="list-style-type: none">

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BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 3/23/25

EVALUATOR NAME: Kristen McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Lead identified, noted 25 years of BH experience (clinician, administration, systems transformation, currently behavioral health services national consultant). Start of professional work in this arena in 1997.• P – provided T&TA in rural and frontier counties, partnership engagement, licensing and regulatory compliance, “national expert in systems of care and HiFi Wrap.”• Q – Question 4 is repeated twice. Appears to be same information, though.• Q – Unclear if Lead (Pittenger) has 8 years of “auditing, etc.” experience, and not as clear detail as the prior section / more generalized terms used – “primarily through senior leadership roles.” Listed as the PI for six different SAMHSA grants.• Q – Notes that she will be joined by the Janus team, with 30+ years of research. (Two direct staff listed, one sub-contractor)

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Refers to information in File 1 / Appendices A-C.• P – Notes 25 years experience of lead (Pittenger).• N – While included in the appendices, would have benefitted from having at least a brief summary integrated into this portion for flow.• P – Provides summary of other members included in the proposal. Other members have pertinent / aligned experience (Gibbons, system transformation, qualitative and quantitative methods, consulting; Clapps, senior leader in human services, data methodology; Roller-White, social sciences research).• P/N – Appreciate that individuals members of team with particular qualifications are included. May have benefitted from more information regarding specifics of “independent” element of role.• P – Well articulated portion of pertinent Medicaid experience, including with pertinent elements such as HiFi Wrap and EPSDT.• P – Well articulated section/s regarding how experience will be leveraged that demonstrates some level of understanding of Maine’s landscape. Even if not entirely pertinent, appreciate the thought in approach and how certain elements might be leveraged.

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EVALUATOR NAME: Kristen McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none"> • P – Appreciate the inclusion of experience with advocacy organizations, including DRNM, as well as State-level engagement. Experience goes beyond the lead IR and includes domains such as service provision. • P/N – Appreciate that the lead has experience with an Agreement in a different State, and that other members of the team bring experience as court monitors and experience in State Government. While deeper detail regarding specifics of skills and experience with mediation would have been helpful, still a well-articulated section. • P – Included projects are pertinent / appropriate.
2. Subcontractors
<ul style="list-style-type: none"> • Pertinent information is provided, N – not entirely clear on capacity.
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • P/N – Org chart included, unclear about lines of responsibility per se.
4. Litigation
<ul style="list-style-type: none"> • No past litigation.
5. Financial Viability
<ul style="list-style-type: none"> • P/L included, some level of loss in previous years.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P – In totality, a well-articulated overview that highlights desirable elements such as a “integrated and iterative mixed method approach,” a grounded and comprehensive approach (Exhibit 1, Quality Service Reviews), stated core principles, and initial set of indicators. Highlights understanding of dynamics with all Parties, and how information can be used to improved system of care. N/Q – Uncertain why some indicators focus on Children in State Custody as that is not the focus of the Agreement.
<ul style="list-style-type: none"> • P – Very well articulated approached to problem-solving approach – noted experience with litigation, shared decision-making and commitment, data-driven decision-making, the role of the IC, and effective communication.
<ul style="list-style-type: none"> • P – All around excellent response that demonstrates deep understanding around the dynamics of communication with different partners.
<ul style="list-style-type: none"> • N – The response here seems out of place and not pertinent.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P/N – Compared to information in the previous section, this particular response seems relatively rote and not as well articulated.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 3/23/25

EVALUATOR NAME: Kristen McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none"> • P – Well-articulated response that highlights an understanding of the process and utility for these reports.
<ul style="list-style-type: none"> • P – Well-articulated approach re: good organizational support, practice and outcomes with an appropriate logic model. Also well-articulated section re: formative, process and outcomes measurement and evaluation activities. • Q/N – Appreciate the proposed approach that considers a Local Leadership Team, landscape analysis, etc., though a more detailed approach would have been helpful. There is also a significant possible burden on providers, children and families, for which the approach to minimize burden is not discussed. Uncertain why child welfare is also mentioned here as while this particular population is a sub-set of Children under the Agreement, this population is not necessarily a specific focus. • Q – What are the implications of using QSR if this is a proprietary mechanism?
<ul style="list-style-type: none"> • P – Very well-articulated response re: possible “back and forth” and “best fit considerations.” • N – Appreciate that the Integration Coordinator is included, though referenced as an Interagency Coordinator, a nuanced detail; attention to detail will be important to all Parties under the Agreement.
<ul style="list-style-type: none"> • N – It is not the role of the IR, nor the IC, to determine when Counsel are required to attend, or when interactions with staff can occur without attendance of Counsel; this goes against the Agreement. Regardless of perceived power imbalances by the IR, State employees are provided the right to representation; this statement is extremely concerning.
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • P – Well-articulated response regarding incorporation of comments.
<ul style="list-style-type: none"> • P/I – Interesting element regarding “gray-literature” and who Janus would be able to consult if needed on workforce.
<ul style="list-style-type: none"> • P – Generally articulated response that again notes the availability to consult if needed.
<ul style="list-style-type: none"> • Q/N – Again, a generally well-articulated response. Unclear if “available to consult” means that this would be within the direct scope of work or if additional funding would be needed. That is, it is not clear if the ability to draw on some of this additional consultation would be part of the direct scope of work proposed, or just noted availability.
<ul style="list-style-type: none"> • P – Appreciate how the cadence of required reporting will be an important function, with the annual and final reports demonstrating compliance.
<ul style="list-style-type: none"> • Q/I – Generally a well-articulated response, though it does prompt additional consideration regarding how some of the elements will be applied.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine DHHS / OBH

D. Budget
<ul style="list-style-type: none">• Acknowledged.
E. Reports
<ul style="list-style-type: none">• P/N – Well-articulated approach, and appreciate the possible table of contents. As noted above, there is a position named – Interagency Coordinator – that is both reflective and not of details within the Agreement. Details regarding process and roles would need to be further discussed.
<ul style="list-style-type: none">• P – Acknowledged expectations re: process.
<ul style="list-style-type: none">• P/N – Acknowledged expectations, but detail is not as robust in previous sections.
<ul style="list-style-type: none">• Acknowledged expectations.
<ul style="list-style-type: none">• I – Appreciate that the parameters under the Agreement are articulated, including the authority of the IR, but this section would have benefitted from a more detailed description of how a more common ground approach, as articulated in earlier sections, would have been facilitated here.
<ul style="list-style-type: none">• Q – The QSR continues to be referenced as a possible tool, and even here as a possible report. It would be helpful to better understand the tool, any pertinent proprietary, and what other options might be available depending on what is needed within Maine.
F. Experience and Qualifications
<ul style="list-style-type: none">• P – Well articulated section.• N – Would have been helpful to understand the specific role of the sub.
G. Technical Assistance
<ul style="list-style-type: none">• P – Appreciate that members of the IR team have the capacity and experience to provide TA, and willing to either work within available resources or identify other third-party support.• Q – If TA is provided by the Janus group, would be good to understand any measures to ensure upholding the role of both functions would be possible.
<ul style="list-style-type: none">• P – Well articulated section, note PDSA cycles, three-part framework that focuses on content, process and relationships.
H. Confidentiality Requirements
<ul style="list-style-type: none">• P – Well articulated approach / section.• Appropriately acknowledged.
I. Reports
<ul style="list-style-type: none">• N – The “how” re: tracking and recording all information specific to reporting is not captured, though project mgmt. approach (with added staff) is noted.• Acknowledgement of the submission of reports.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Kristen McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

2. Staffing

- I – Job descriptions are provided, not as detailed or articulated as in other sections.
- P – Note that the sub relationship is based on a well-established working relationship.
- Q – Would want to ensure that approach is not focused on “children in state custody” as this is not a population with significant focus.
- N – Staffing plan is included, but time allocation does not align with the hours in previous section. More a listing of positions than a plan.

3. Implementation - Work Plan

- P – Clear pathway re: start-up, landscape analysis, quantitative and qualitative analysis, etc.
- Q – Again, unclear why focus is on CISC as well as continued emphasis on use of QSR. Considering the proprietary nature of this instrument, will be helpful to understand flexibility / other options. Uncertain why and which Maine staff and partners would need to be trained in QSR.
- N – Annual onsite reviews might not be sufficient to understand and review the depth of services in Maine.
- N – Gant chart would have benefitted from further detail, including individual responsible for task and additional depth on tasks.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 23MAR2025

EVALUATOR NAME: Sara Olsen

EVALUATOR DEPARTMENT: DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
1. P – Demonstrated 8 years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, specifically, administration, funding, and delivery of services. Demonstrated 8 years of program evaluation of Community-Based Services for Children with Behavioral Health Disabilities.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – development and delivery of programs to transition justice involved youth from out-of-home placement;• P – administration and delivery of Wraparound curriculum;• P – administration, funding, and delivery of statewide behavioral health services;• N – only two instances of work in rural counties and states similar to ME;• P – experience developing and implementing Medicaid State Plans and 1915c waivers;• P – previous TA transitioning children with behavioral health disabilities from out-of-home-placement to community
2. Subcontractors
<ul style="list-style-type: none">• P – sub has experience with needs assessments of behavioral health systems in multiple states with population sizes and rural areas similar to ME
3. Project Team Organizational Chart
<ul style="list-style-type: none">• P
4. Litigation
<ul style="list-style-type: none">• P
5. Financial Viability
<ul style="list-style-type: none">• P – four year net profit despite losses
Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 23MAR2025

EVALUATOR NAME: Olsen

EVALUATOR DEPARTMENT: DOJ

<ul style="list-style-type: none">• P – plan involves state, stakeholders, and families to understand the landscape of services before evaluating behavioral health system performance; P - designed to provide actionable information and establish sustainability through TA;• P – proposed initial set of performance indicators
B. Assessment Methodology Plan
<ul style="list-style-type: none">• P – proposes working with state to develop query templates and regular reporting to minimize impact of data requests on state
C. Additional Requirements
<ul style="list-style-type: none">• P
D. Budget
<ul style="list-style-type: none">• P
E. Reports
<ul style="list-style-type: none">• P
F. Experience and Qualifications
<ul style="list-style-type: none">• P
G. Technical Assistance
<ul style="list-style-type: none">• P
H. Confidentiality Requirements
<ul style="list-style-type: none">• P
I. Reports
<ul style="list-style-type: none">• P
2. Staffing
<ul style="list-style-type: none">• P
3. Implementation - Work Plan
<ul style="list-style-type: none">• P

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 3/25/25

EVALUATOR NAME: Nonny Onyekweli George

EVALUATOR DEPARTMENT: US DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none"> • Y • 15 years of utilizing quality services • System-wide transformation- deep end initiative and high fidelity wraparound
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • P: p. 4 – closing two residential facilities • P: p. 4 development of rates in HFW, and other therapies • P: p. 5 knowledge of Maine’s systems- Bright future guidelines • P: p. 5- securing funding to improve children’s behavioral health • P: experience with children • P: p. 8/9 experience implementing a settlement agreement in other states
2. Subcontractors
<ul style="list-style-type: none"> • P- CWPG- experience in rural areas
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • P: two people
4. Litigation
<ul style="list-style-type: none"> • P:
5. Financial Viability
<ul style="list-style-type: none"> • P: expected
Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P: QSR • P: Experience with “litigation driven” work • P: Adhoc reports- determine impact
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P: independent reviewer drill down; focused on oohp • P: Roller- experience
C. Additional Requirements

**STATE OF MAINE
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DATE: 3/25/25

EVALUATOR NAME: Nonny Onyekweli George

EVALUATOR DEPARTMENT: US DOJ

<ul style="list-style-type: none"> • P- experience with trainings p. 13
<ul style="list-style-type: none"> • P: policy landscape analysis
D. Budget
<ul style="list-style-type: none"> • P- in budget
E. Reports
<ul style="list-style-type: none"> • P-table of contents P.16
F. Experience and Qualifications
<ul style="list-style-type: none"> • P- .6 FTE • P- deep data knowledge p.21
G. Technical Assistance
<ul style="list-style-type: none"> • P: demonstrates awareness of potentially time-consuming nature
H. Confidentiality Requirements
<ul style="list-style-type: none"> • P: sufficient
I. Reports
<ul style="list-style-type: none"> • P: monthly status report sections. P. 27
2. Staffing
<ul style="list-style-type: none"> • P: two leads will hire program manager • P: majority of staff named
3. Implementation - Work Plan
<ul style="list-style-type: none"> • P: Sufficiently detailed • P: demonstrates awareness of how long particular phases might be • Q: how tied is it to the SA

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Bryce Pittenger/Janus Consulting and Co-Creating, LLC (Janus)

DATE: 3/21/25; 3/24/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
•

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – lead is a mental health counselor with 25 yrs exp in urban and rural service development, training and staff development, and state agency experience over behavioral health programs.• P – lead describes approach combining EPSDT and primary care to better identify children with behavioral health disabilities – leveraging resources in line with the settlement agreement.• P – pg 6 of PDF accurately explains the goal of the agreement – to roll out High Fidelity Wraparound to serve youth at home rather than in congregate/residential treatment settings.• P – discusses importance of involving individuals with lived experience and how to maximize stakeholder input and ownership of system-transformation efforts.• P – lead has experience in relevant settlement in another state with rural areas.• P – additional team member has experience in system transformation. PhD and MSW. Quality Services Review background, and has experience with state agencies, universities, providers, and non-profits increasing access to services for youth and families. Experience with another very isolated state implementing litigation-driven system reform for children’s behavioral health for children with serious emotional disturbance.• P – additional team member has infrastructure experience with child welfare and mental health state systems. Experience in another state with rural areas focusing on child welfare/children’s behavioral health services for children with complex needs. Experience at Casey Family Programs (well-regarded entity in relevant field). Experience working with another state re: child welfare and behavioral health services.• P – additional team member with social science research background focused on child welfare.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 3/21/25; 3/24/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – team has previously worked on similar litigation-driven children’s service system transformation, and mediation, conflict resolution, and problem solving in similar contexts. • P – references awareness of settlement process (that DOJ and state negotiated agreement and both parties will be involved in compliance) and working with DOJ attorneys and state leadership • Project 1 – work done under a settlement agreement in another state to transform its system to provide services to children in family homes instead of in institutions. • Project 2 – project to implement High-Fidelity Wraparound, Multi-systemic Therapy and other relevant community-based services; as well as quality service reviews for children and adult behavioral health services.
2. Subcontractors
<ul style="list-style-type: none"> • Names a technical assistance organization specializing in child welfare and children’s behavioral health reforms.
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Lists five roles – Principal Independent Reviewer, principal, senior practice advisor, data analyst, and lead data evaluation.
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Q – not sure how to interpret

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P - Mixed methods (quantitative and qualitative)
<ul style="list-style-type: none"> • P - Includes interviews of parents, partners, stakeholders, and staff
<ul style="list-style-type: none"> • P - Quality service reviews and qualitative case-based point in time methodology
<ul style="list-style-type: none"> • P – Regularly gather data, analyze, and present recommended action steps • P – they reviewed the Letter of Findings and proposed specific steps such as reviewing Medicaid claims data to track emergency department visits and hospitalizations • P – includes qualitative review of ISPs

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EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – resolving conflicts – bringing data into the discussion, specific strategies for mediating conflicts, specific examples of opportunities for discussion/resolving conflicts • P – notes importance of the Independent Reviewer’s neutrality in working with the parties.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P – discussion of building mixed-methods assessment and methodology plan, providing the Parties opportunity to weigh in prior to finalizing
<ul style="list-style-type: none"> • P – will work with state to identify quantitative reports, including minimum data set required by agreement
<ul style="list-style-type: none"> • P – noted that Reviewer will also gather data through surveys, file reviews, etc.
<ul style="list-style-type: none"> • P – for ad hoc reports, noted will work with the Parties to estimate resources needed for ad hoc reports and work with the Parties if adjustments are needed
C. Additional Requirements
<ul style="list-style-type: none"> • P - logic model that includes how resources and capacity must increase (improved data/reporting; improved multisystem collaboration; Treatment Foster Care; rules/policies; in-home services; and clinical training) should be measured by decreases in out-of-home placements, and increases in placement stability, emotional/behavioral, educational, physical well-being, permanency, and transitions to adulthood
<ul style="list-style-type: none"> • P - create Local Leadership Team that includes youth/family with lived experience
<ul style="list-style-type: none"> • P - training will include follow up focus groups and interviews about the quality, impact, and learning experiences of staff in training
<ul style="list-style-type: none"> • P proposed clear format for baseline and future reporting on compliance with Agreement goals, objectives, tasks, and targets, with annual report as primary mechanism for reporting on compliance
D. Budget
<ul style="list-style-type: none"> • File 4 – Appdx H (don’t have this yet) • Won’t exceed \$900,000 over three years
E. Reports
<ul style="list-style-type: none"> • P – report will clearly state whether State is in compliance or not, how it is progressing toward future compliance, and recommendations to advance systems of care. Recs will be vetted by Local Leadership Team. Recognizes that the intent is for report to be made public
<ul style="list-style-type: none"> • Neutral – demonstrates understanding of final report and process

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EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – recognizes importance of providing assessment of progress and pace of transformation
<ul style="list-style-type: none"> • P – goes extra mile to include possible formats for Parties’ comments
<ul style="list-style-type: none"> • P – recognizes importance of considering comments but that independent reviewer has final authority to decide what goes into the report
<ul style="list-style-type: none"> • P – highlighted how some ad hoc reporting is already part of their plan (e.g., quality service review data visualization) and assess the ability to provide additional ad hoc reporting
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • P - .6 FTE for lead reviewer. Team includes MSW, LCSW, LPCC, etc.
<ul style="list-style-type: none"> • P – experience in state government and consulting roles administering children’s beh health services, system transformation as part of settlement monitoring teams, social science research, etc.
<p>G. Technical Assistance</p>
<ul style="list-style-type: none"> • P – experience providing technical assistance on children’s behavioral health system transformation to community-based services under settlement agreements.
<ul style="list-style-type: none"> • P – Focus on content-process-relationships. Will seek outside consultants if additional expertise is needed.
<p>H. Confidentiality Requirements</p>
<ul style="list-style-type: none"> • P – already has professional and general liability insurance and can get additional insurance if needed.
<ul style="list-style-type: none"> • P – has experience ensuring protections of personal identifiable health information; and processes for safeguarding/destroying data after contract ends
<ul style="list-style-type: none"> • Neutral – shows familiarity with requirements of contract
<ul style="list-style-type: none"> • P – awareness of existing Maine confidentiality requirements
<p>I. Reports</p>
<ul style="list-style-type: none"> • P – project plan and master calendar plan
<ul style="list-style-type: none"> • P – work plan and staffing plan
<p>2. Staffing</p>
<ul style="list-style-type: none"> • P – attachment 6 – relevant job descriptions • P – Child Welfare Policy and Practice Group subcontractor. • P – staffing plan attachment with time allocations for each team member
<p>3. Implementation - Work Plan</p>
<ul style="list-style-type: none"> • P – project start up description. Regular meeting and task schedule, major deliverables. Landscape analysis. • P – Gantt Chart with specific tasks, hours of staffing, etc.

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- | |
|--|
| <ul style="list-style-type: none">• P – will establish baseline measures of current system, to serve to show progress. |
|--|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/23/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P 40 year organizational history supporting behavioral health services across care coordination, professional clinical staffing, quality improvement services, and complex health management• I – organization is a direct service provider of HCBS services across the lifespan.• I – parent organization is a nationwide MCO, and has engaged in a variety of system transformation efforts with various states.• I – most projects noted for auditing, research, program evaluation, statistics or data analysis were contracted for technical assistance of specific instances (i.e. improving monitoring for CMS standards of ICFs or addressing non-compliance within program standards). Data analysis is alluded to in the context of these activities.• P – Work history includes 6 years compliance monitor for New Jersey in DOJ settlement agreement (2004-2010).• N – majority of projects noted for auditing, research, program evaluation, statistics or data analysis have occurred in past 5 years.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• I – Bidder has a 41 year history of operation partnering with over 150 agencies in 47 states, and currently has clients in Alabama, Arkansas, California, DC, Missouri, New Mexico, and Pennsylvania, and performs monitoring services, systems review and development of change management plans, risk management services, training, technical assistance, best practice guidelines, and more.• I – bidder notes have extensive network of employees and consultants with expertise spanning all levels of complex care.• I – Bidder actually noted 3 projects, combined two activities into one, working with New Jersey DHS as a monitor for a settlement agreement with the DOJ and as a health and safety monitor for DHS transitioning from a facility.• I – bidder provided a second project aimed at achieving a settlement agreement
2. Subcontractors

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DATE: 3/23/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS OBH

<ul style="list-style-type: none"> I – Bidder noted a plan to use a subcontractor with extensive experience with administration and oversight of HCBS waivers, implementation of Olmstead, and navigation of litigation and settlement agreements.
<p>3. Project Team Organizational Chart</p>
<ul style="list-style-type: none"> I – Org chart supplied, three positions remain TBD. The subcontractor is not reflected in the proposed org chart.
<p>4. Litigation</p>
<ul style="list-style-type: none"> I – 4 litigation cases currently ongoing (1 wrongful death, 2 employment, 1 medical malpractice)
<p>5. Financial Viability</p>
<ul style="list-style-type: none"> Using balance sheet, Current ratio has increased steadily over past 3 years, showing financial strength and adequate cash on hand to pay their bills. 2022 - 3.15, 2023 - 4.61, 2024 - 6.64

<p>Part IV, Section III. Proposed Services</p>
<p>1. Services to be Provided</p>
<p>Part II</p>
<p>A. Independent Reviewer’s Role and Authority</p>
<ul style="list-style-type: none"> P – Bidder notes a core team supporting this effort and pulling in subject matter experts as needed. P – Bidder acknowledges benchmarks in the agreement including care coordination, high fidelity wraparound, community outreach and engagement, availability and access to quality providers, and successful community returns.
<ul style="list-style-type: none"> P – Bidder notes objective and solution-oriented mediation, consensus building, compliance and shared goals, and data driven problem solving as methods to approach structured problem solving aimed at effectively resolving disagreements.
<ul style="list-style-type: none"> P – bidder noted HIPAA compliance with communications and noted that any information disclosed that required attention such as abuse, neglect, and fraud would be reported for timely action. P – bidder noted they understood the state reserves the right to require the IR to copy state’s counsel with respect to engaging state employees or staff and the Agreement supports that. P – Bidder noted they will engage stakeholders, counsel, the parties, government agents, and other key stakeholders as needed to fulfill the agreement, and will do so impartially ensuring professionalism, transparency and adherence to ethical guidelines.

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EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS OBH

<ul style="list-style-type: none">• P – bidder stated they are experienced providing testimony and the Director and Lead will be prepared to testify as needed on the observations, findings and recommendations in matters relevant to the agreement.
B. Assessment Methodology Plan
<ul style="list-style-type: none">• I – bidder notes they have extensive experience in handling settlement agreements related to DOJ and other plaintiffs and noted collection methods can include document review, interviews, and onsite or remote observation.• P – bidder noted Parties will be notified no later than 2 weeks prior to the interview.• P – Bidder noted onsite reviews will be scheduled in advance unless parties request unannounced visits. Bidder noted data will be shared regularly and if there are negative trends in the data, the State will be required to report on actions taken or to be taken at next scheduled meeting – this timeline could be aggressive depending on the trends discovered and action to be taken.• P – bidder noted that during onsite reviews, of abuse, neglect or extraordinary situation occurs they will immediately report it to the Department and Project lead. Of potential concern though is the note that team members remain on site under event is over.• P – Bidder noted key elements of the assessment methodology plan including: clear communication, established and agreed upon standards, confirmation of data elements, establishment of benchmarks, detailed assessment process, established elements of the data report, established quality assurance processes, plan for receiving and implementing feedback, ensuring plan will be presented with 45 days of the receipt of the implementation plan, and a plan for biennial updates.
<ul style="list-style-type: none">• P – bidder noted they have the capacity to produce ad-hoc reports at the request of the Department and can provide redacted examples of reports upon request.
<ul style="list-style-type: none">• I – Bidder restated they will do the requirement in the RFP.
<ul style="list-style-type: none">• P – bidder noted establishing data needs with the Department including access requirements then developing a clearly defined schedule for regular data requests and a mutually agreed upon timeline for ad-hoc requests.
<ul style="list-style-type: none">• P – bidder noted they understood the state reserves the right to require the IR to copy state’s counsel with respect to engaging state employees or staff and noted they will provide sufficient notice to the parties, with options to participate in person or virtually.
C. Additional Requirements
<ul style="list-style-type: none">• I – bidder stated they will review and provide comment to implementation plan according to schedule

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/23/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS OBH

<ul style="list-style-type: none"> • I – bidder stated they will review workforce shortages and noted key steps to accomplish that task that appear relevant, though lack some detail.
<ul style="list-style-type: none"> • I – bidder stated they will review training policies according to schedule
<ul style="list-style-type: none"> • N – bidder lacked sufficient detail noting they will use onsite and offsite time to review policies, processes and procedures.
<ul style="list-style-type: none"> • P – bidder acknowledged need to review compliance at any time and noted if there are problems or a lack of progress in the implementation plan, they will notify both Parties that it is their intent to review the status of compliance in a particular provision of the State’s implementation plan.
<ul style="list-style-type: none"> • P – bidder notes trauma informed training available to all employees and focuses on four foundations: realization, recognize, respond, and resist. They also include six key principles of trauma-informed approach.
<p>D. Budget</p>
<ul style="list-style-type: none"> • I – bidder noted they will supply a budget 120 days prior to renewal period.
<p>E. Reports</p>
<ul style="list-style-type: none"> • P – bidder notes report format will be agreed upon and consistent throughout term of monitoring period and noted they will gather input from multiple stakeholders to determine necessary information is included.
<ul style="list-style-type: none"> • I – Bidder states they will meet the intent and provide a final report 9 months prior to termination date.
<ul style="list-style-type: none"> • I – bidder states they measure goals against baseline and may assign a numbered rating or score for compliance showing performance against the baseline. Bidder also notes reports will be presented in clear and cohesive manner.
<ul style="list-style-type: none"> • I – bidder stated they are committed to adhering to timelines.
<ul style="list-style-type: none"> • I – bidder notes they will provide finalized report within 15 days after feedback.
<ul style="list-style-type: none"> • I – bidder restates requirement saying they will complete ad-hoc reports as capacity allows and build into the timelines.
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • N – bidder states they will appoint at least one lead individual at .5 FTE and will fill team with subject matter experts. With individuals not identified for this work, reviewer cannot rate the staff meet minimum quals for the RFP.
<ul style="list-style-type: none"> • N – bidder states they have subject matter experts in all necessary subject areas, but that is a challenge to confirm when no staff are described for this project, relying on to be determined subcontractors. Instead, bidder relies on work history and relevant projects to reinforce expertise in project areas.
<p>G. Technical Assistance</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/23/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS OBH

<ul style="list-style-type: none"> N – bidder restated the RFP requirement and said they will analyze need requests and draft a plan to provide TA.
<p>H. Confidentiality Requirements</p>
<ul style="list-style-type: none"> I – bidder notes they have and will maintain insurance policies meeting minimum requirements.
<ul style="list-style-type: none"> I – bidder notes they will implement risk assessment and vulnerability scanning IF they electronically collect PII or PHI. They also note they do not have internal systems to store PII or PHI and instead use Sharepoint which is multifactor authenticated for access.
<ul style="list-style-type: none"> I – bidder notes using Sharepoint and Microsoft based accounts with standard passworded security measures. P – bidder notes they have a dedicated HIPAA privacy officer and train all new employees in HIPAA and confidentiality as regulated by each state served within first 30 days of hire.
<ul style="list-style-type: none"> I – Bidder notes will meet all confidentiality requirements and will notify contract administrator in the event of a breach.
<p>I. Reports</p>
<ol style="list-style-type: none"> I – bidder noted they will track all data necessary to complete required reports I – bidder noted they will submit all required reports according to schedule.
<p>2. Staffing</p>
<ul style="list-style-type: none"> I – Staffing plan and generic job descriptions supplied. N – unclear how much of the team is made up of consultants who are yet to be determined N – Bidder’s suggested use of subcontractors has the reviewer questioning the utility of the org chart supplied previously given major roles are subcontracted with staff yet to be determined. I – Bidder notes the Director of Project management, a 10 year employee with bidder will have consistent communication with project staff to assure deliverables are met. I – Staffing plan notes position FTE and assures lead will be at least .5 FTE.
<p>3. Implementation - Work Plan</p>
<ul style="list-style-type: none"> I - Supplied a concise work plan in Attachment 8 and noted it will be updated and finalized once implementation plan is complete. P – while simplistic, the work plan supplied appears realistic to achieve major work areas anticipating a May contract start time with target completion dates as applicable.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/24/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

Individual Evaluator Comments:

Part I. Preliminary Information

Part IV. Section I. Eligibility Requirements

- 40 years of history providing services to state agencies, facilities, and community programs that serve people with disabilities and complex health needs
- Provider of home and community-based services for 22 years, including rural communities
- Provider of service in a variety of states since 2003
- Evaluation experience in many states since 2001

Part IV. Section II. Organizational Qualification and Experience

1. Overview of the Organization

- Brief statement of qualifications and history of the bidder's work
 - Assistance to states and orgs seeking to improve existing programs through training and TA or responding to regulatory inquiry or pending litigation.
 - Experience providing TA and training to home and community-based services
 - Monitoring services for DOJ litigation
 - Worked with 150 agencies in 47 states
 - Extensive network of employees and consultants with experience spanning all aspects of complex care
 - Qualified as a Quality Improvement Org by CMS
- Experience in Medicaid, EPSDT, etc.
 - Experience monitoring and TA in remediation of decertification and actions and settlement agreements
 - Developed Plans of Correction
 - Exp in transitioning 400 individuals to other providers
 - Developed, implemented, and monitored directed corrective action plans
 - Determined compliance with rules and regs in MO
 - Experience as a provider of case management services
 - Will engage with stakeholders as part of monitoring plan and tool
- Experience directly working with providers, etc.
 - Providing care coordination to 16,000 individuals in 5 states

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/24/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> ○ Working with people with DD in MO ○ Direct experience working with disability service providers ○ “expanding work into new areas”? ● Mediation and conflict resolution <ul style="list-style-type: none"> ○ WY TA and staffing and interim management team ○ Partnership with Kern Regional Center for below-standard performance ● Two projects: <ul style="list-style-type: none"> ○ NJ – monitor for settlement agreement between DOJ and NJ related to new Lisbon developmental center and Woodbridge developmental center <ul style="list-style-type: none"> ▪ Monitored and reported on state’s compliance with all provisions – auditing of facility operations and related data and analysis ○ UT – Independent expert involving individuals who were living in ICF/IDDs who wished to live in the community <ul style="list-style-type: none"> ▪ Objective was to get to a settlement agreement ▪
<p>2. Subcontractors</p> <ul style="list-style-type: none"> ● Beth Shaw – former director of dept of behavioral health and dev disabilities in GA ● Randall Webster – formerly at MA DDS, experience with compliance with Olmstead
<p>3. Project Team Organizational Chart</p> <ul style="list-style-type: none"> ● Seems like key personnel are not indicated on the org chart
<p>4. Litigation</p> <ul style="list-style-type: none"> ● Some ongoing litigation, seemingly related to their operation or support of facilities
<p>5. Financial Viability</p> <ul style="list-style-type: none"> ● Goodwill and intangibles seems to be carrying a lot of weight regarding their financial situation

<p>Part IV, Section III. Proposed Services</p> <p>1. Services to be Provided</p> <p>Part II</p> <p>A. Independent Reviewer’s Role and Authority</p> <ul style="list-style-type: none"> ● Will meet with stakeholders after implementation plan is complete to develop a monitoring plan with timelines ● Will present all information and findings in a manner of actionable steps to align and uphold expectations of the agreement
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**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

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DATE: 3/24/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> • Will be the decider on whether the issue is one that is present in the agreement or one that is not relevant to the agreement's provisions • Working collaboratively with DoJ and state partners
<ul style="list-style-type: none"> • Will engage in ex parte comms as deemed necessary to fulfill oversight responsibilities
<ul style="list-style-type: none"> • Experienced in representing state govts to provide testimony in legal proceedings
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> • Methods may include document review, interviews of staff or others, and onsite or remote observation • Experience reviewing homes and programs using a straightforward list of questions that are rated while at the site and recorded • Will work to identify data elements requested • Can use services of a statistician and two experts with experience in data collection and analysis
<ul style="list-style-type: none"> • Can provide ad-hoc reports
<ul style="list-style-type: none"> • Will use methods mentioned in the settlement agreement
<ul style="list-style-type: none"> • Will work with IT staff
<ul style="list-style-type: none"> • Will give notice to staff for all interviews for counsel to be present
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • Will provide comments within 30 days
<ul style="list-style-type: none"> • Will analyze data regarding workforce and take key steps
<ul style="list-style-type: none"> • Will review training policies and curricula
<ul style="list-style-type: none"> • Will use on and off-site time
<ul style="list-style-type: none"> • Understands that can require compliance at any time
<ul style="list-style-type: none"> • Understands a trauma-informed approach
<p>D. Budget</p>
<ul style="list-style-type: none"> • Will provide budget if contract renewal within 120 days
<p>E. Reports</p>
<ul style="list-style-type: none"> • Will file annual public report
<ul style="list-style-type: none"> • Will file final compliance report
<ul style="list-style-type: none"> • Comprehensive reviews will identify strengths and weaknesses of service delivery systems
<ul style="list-style-type: none"> • Will provide draft and final reports within the timelines
<ul style="list-style-type: none"> • Will provide finalized report within the timeframe
<ul style="list-style-type: none"> • Will develop a process for ad-hoc reports

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

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DATE: 3/24/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

F. Experience and Qualifications
<ul style="list-style-type: none">• Will establish at least .5 FTE for project lead. This person not identified yet• Also will establish a team of SMEs• Identified team members and established job descriptions• Claims that SMEs have all relevant experience
G. Technical Assistance
<ul style="list-style-type: none">• answer restates that they will meet the obligation in the question• answer says that State will be provided with TA
H. Confidentiality Requirements
<ul style="list-style-type: none">• Has insurance• No internal systems to store PII and PHI?• Has data privacy practices• Will adhere to data breach guidelines
I. Reports
<ul style="list-style-type: none">• Will produce reports
2. Staffing
<ul style="list-style-type: none">• Outlined job descriptions and roles and responsibilities• Will use a mix of full-time staff and subcontractors• Included staffing plan
3. Implementation - Work Plan
<ul style="list-style-type: none">• Work plan attached

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/23/25

EVALUATOR NAME: Kristen McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Founded in 1984, notes “40 years of providing services to state agencies, facilities and community programs that serve people with disabilities and complex health needs.” QI division provides clinical and non-clinical T & TA to state and providers in over 27 states with a focus on QI and regulatory compliance.• P – Multiple examples of provision of H&CBS, overseeing administration / funding, and systems wide transformation, with some examples in rural states.• P – Multiple, specific examples of auditing / data in pertinent roles / projects (Missouri H&CBS, CA DDS, etc.)
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – Well articulated opening statement that includes detail on H&CBS, monitoring services in a similar capacity, training and technical assistance, “shoulder to shoulder approach,” QIO.• P – Multi-state, multi-year experience.• Q – Detail in varying portions under Part IV re: “serving and supporting” – uncertain whether this is at the organizational level or team identified for this specific project.• N – Appreciate that under the Agreement there is a framework for “disabilities” but the RFP established the Maine infrastructure that ultimately will be supporting implementation under the Agreement.• Q – Unclear why there will be training on the monitoring plan – may be discussed further in the response.• P/N – Note at a high level experience working with providers, individuals and advocacy, but detail is not deep.• P – Two projects listed are pertinent, including acting as Monitor.
2. Subcontractors
<ul style="list-style-type: none">• Two subcontractors listed with pertinent information.
3. Project Team Organizational Chart
<ul style="list-style-type: none">• Included.
4. Litigation
<ul style="list-style-type: none">• Included.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/23/25

EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

5. Financial Viability
<ul style="list-style-type: none"> Included.

Part IV, Section III. Proposed Services
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1. Services to be Provided

Part II

A. Independent Reviewer's Role and Authority

- P – Appreciate introduction and attention to elements that are specific to Maine, including Care Coordination, HiFi Wrap, outreach and engagement, etc. and noted collaborative approach.
- N – Some portions are more re-iterated than delved into, or with specificity.

- P – Well articulated concepts and process, including solution-oriented mediation, consensus building, etc.

- P – Well articulated and appreciated portion re: guardrails or ex parte communications.

- N – Uncertain how Project Director and Lead are experienced when they are TBD in the Org Chart.

B. Assessment Methodology Plan

- Q – Unclear is the PD and L that are noted to have extensive experience are the subcontractors listed? Or if these individuals have been identified?

- Q – Much of this portion seems focused on protocols regarding notification, identification of individuals, etc. Unclear alignment with this section of the RFP.

- P – Key components of the plan articulated, including communication, standards, data elements.

- P/N – Methods listed are pertinent, though greater depth of detail would have been helpful.

- P – Noted acknowledgement of expectations for representation.

C. Additional Requirements

- P – Well articulated process / section.

- N – Minimal detail to the extent that it is hard to understand approach.

- N – More of an acknowledgment rather than a detailed or in-depth response.

- P – Well articulated section that includes a Trauma-Informed Care Training and lists components of the training.

D. Budget

- Acknowledged.

E. Reports

- N – More of an acknowledgment rather than a detailed or in-depth response.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/23/25

EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none">• N – More of an acknowledgment rather than a detailed or in-depth response.
<ul style="list-style-type: none">• P – Additional detail in this section, including minimal components of annual and final reports.• Q – Focus includes state-run facilities and actions in case of critical deficiencies. This is valuable, but not exclusively pertinent to the Agreement.
F. Experience and Qualifications
<ul style="list-style-type: none">• N – Lead not already known, though alluded to possible candidates.
<ul style="list-style-type: none">• N – Note that via the team of Subject Matter Experts there is relevant experience and qualifications – uncertain why this doesn't include a named entity and pertinent experience.
G. Technical Assistance
<ul style="list-style-type: none">• P – TA will be provided directly should thresholds exceeded.• P – Details included re: assumptions and operating principles.
<ul style="list-style-type: none">• P – Again, note that TA will be directly provided and which elements are included.
H. Confidentiality Requirements
<ul style="list-style-type: none">• P – Pertinent acknowledgement with details.
<ul style="list-style-type: none">• P/N – Pertinent detailed response but would need to further understand the impact of not having internal systems to store PHI.
<ul style="list-style-type: none">• P – Pertinent acknowledgement with details.
I. Reports
<ul style="list-style-type: none">• N – More of an acknowledgment rather than a detailed or in-depth response.
2. Staffing
<ul style="list-style-type: none">• P – Pertinent job descriptions provided.• N – Unclear the role and oversight of subcontractors.• P/N – Staffing plan included, would have benefitted from additional detail.
3. Implementation - Work Plan
<ul style="list-style-type: none">• P – Gant chart included which details pertinent timelines and parties responsible.• N – Additional detail needed for milestones.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 23MAR2025

EVALUATOR NAME: Sara Olsen

EVALUATOR DEPARTMENT: DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P - Demonstrated 8 years of expertise and experience related to services for Children with Behavioral Health Disabilities, specifically, administration, funding, and delivery of services. Demonstrated 8 years of program evaluation of Community-Based Services for Children with Behavioral Health Disabilities• Q - In the statement, "We currently provide services to approximately 16,000 individuals in five states (Georgia since 2003, Indiana since 2012, Delaware since 2017, Kentucky since 2017, and New Jersey since 2018)," is the service provided continuous?
Part IV. Section II. Organizational Qualification and Experience
<ul style="list-style-type: none">• Overview of the Organization
<ul style="list-style-type: none">• P – multiple projects in states with similar size population and rural areas as ME;• N – no demonstrated experience in community-based settings as defined in the SA;• Q – how is the monitoring tool implemented? With a self-scoring instruments, is there room for the nuance of assessing compliance with the SA?
<ul style="list-style-type: none">• Subcontractors
<ul style="list-style-type: none">• P
<ul style="list-style-type: none">• Project Team Organizational Chart
<ul style="list-style-type: none">• P
<ul style="list-style-type: none">• Litigation
<ul style="list-style-type: none">• P
<ul style="list-style-type: none">• Financial Viability
<ul style="list-style-type: none">• P
Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none">• N – did not describe how evaluation would occur or what process and outcome measures may be used

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 23MAR2025

EVALUATOR NAME: Olsen

EVALUATOR DEPARTMENT: DOJ

B. Assessment Methodology Plan
<ul style="list-style-type: none">• N – does not identify data elements the bidder would request from the state.
C. Additional Requirements
<ul style="list-style-type: none">• P – trauma informed care training is available to all employees
D. Budget
<ul style="list-style-type: none">• P
E. Reports
<ul style="list-style-type: none">• P
F. Experience and Qualifications
<ul style="list-style-type: none">• N – expertise related to services for children with behavioral health disabilities not described
G. Technical Assistance
<ul style="list-style-type: none">• P
H. Confidentiality Requirements
<ul style="list-style-type: none">• P
I. Reports
<ul style="list-style-type: none">• P
2. Staffing
<ul style="list-style-type: none">• P
3. Implementation - Work Plan
<ul style="list-style-type: none">• P

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/26/25

EVALUATOR NAME: Nonny Onyekweli George

EVALUATOR DEPARTMENT: US DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none"> • Y • 8 years of experience in transitions to community-based placement • Q: Could these services occur in group homes and large facility • Rural areas experience
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Q: early start services p.3 • Q: HCBS compliance • P: experience working with DR organizations and individuals with disabilities • Q: unclear if conflict-resolution strategies include between parties • Q: p.8 experience seems to be moving 400 people from one facility to 9 facilities • P: project 2 demonstrates experience mediating, resolving conflicts between two litigating parties
2. Subcontractors
<ul style="list-style-type: none"> • P: familiarity with DOJ settlement agreements
3. Project Team Organizational Chart
<ul style="list-style-type: none"> •
4. Litigation
<ul style="list-style-type: none"> • Q: ongoing litigation
5. Financial Viability
<ul style="list-style-type: none"> •
Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> • P: approach to disputes between parties p. 2 • P: experience with providing testimony
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P: familiarity with the settlement agreement process and this SA to be exact

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/26/25

EVALUATOR NAME: Nonny Onyekweli George

EVALUATOR DEPARTMENT: US DOJ

<ul style="list-style-type: none">• Q: used applicable SA language but unclear how it will be done
C. Additional Requirements
<ul style="list-style-type: none">• Q: used applicable SA language but unclear how it will be done
D. Budget
<ul style="list-style-type: none">•
E. Reports
<ul style="list-style-type: none">• P: minimum issues the reports will cover p. 10• P: tracker for ad hoc reports
F. Experience and Qualifications
<ul style="list-style-type: none">• Q: unclear if lead is chosen• Q: most experienced with adults
G. Technical Assistance
<ul style="list-style-type: none">• N: pulled language from SA
H. Confidentiality Requirements
<ul style="list-style-type: none">• P: sufficient
I. Reports
<ul style="list-style-type: none">•
2. Staffing
<ul style="list-style-type: none">• P: sufficient• Q: no named individuals• P: detailed job descriptions
3. Implementation - Work Plan
<ul style="list-style-type: none">• P: sufficiently detailed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/19/25; 3/20/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• Q – unclear how much specific experience they have with children’s behavioral health transitions to family-based settings. The examples are of big populations that include adults, people with IDD, etc., that include some youth. Lack of specificity about whether they have any experience with children with behavioral health disabilities receiving services to live with their biological/foster families.• Q – 2024 project about diversion of individuals with IDD – unclear where they are diverting them to (is it family-based settings or group settings?)• Q – 2022 DMH project related to Targeted Case Management – for children? For adults? In what settings? Includes many generic “HCBS” references but this can include group settings whereas the IR bid is about services that enable children to live at home with a family.• N - The bid speaks broadly about experience going back to the 1970’s and working with various service providers but lacks details specifically about moving children with behavioral health needs from hospitals or residential facilities to the community.• N - The specifics appear to focus on outdated and institutional services (deinstitutionalization example was from the 1970’s; transition of individuals from a behavioral health center in GA to an inpatient Regional Hospital).• P – Experience with rural areas.• P – Experience with auditing, research, program evaluation, data analysis.

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Q – reference to work with community programs – what does this refer to?<ul style="list-style-type: none">○ Reference at pg. 3 of File2 to “in-home services” – what does this refer to?○ Head Start program – children under 7 who were at risk• N – bulk of experience refers to state-operated Intermediate Care Facilities, behavioral health facilities, state-operated Developmental Centers (intellectual/developmental disability focus)• Q – Quality Improvement Organization (QIO) background – this is usually auditing state services with a focus on Medicaid requirements, but not necessarily integration focused

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/19/25; 3/20/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • N – reference to how their knowledge will be applied to deliverables is to develop a “self-scoring tool.” Likely oversimplistic for the Independent Reviewer’s role. Overly general “methods used in past projects can be utilized” • Q – reference to care coordination/Targeted Case Management work could be helpful, but unclear whether this is related to children’s behavioral health services in family homes • P – face-to-face interviews with individuals with disabilities • N – CARF accreditation – this is only for facilities. Concerned that this reflects a misunderstanding about what the agreement’s goals are. • P – direct experience with individuals with disabilities • N – the description of medication and conflict resolution was vague. The examples provided did not seem relevant. • N – Project One is about oversight of a settlement around facility care for adults with intellectual and developmental disabilities rather than children’s services or community-based services. • Q – Project Two was about work under settlement to return adults with intellectual and developmental disabilities leaving Intermediate Care Facilities to return to the community – unclear whether they returned to their own apartments or to smaller group homes.
2. Subcontractors
<ul style="list-style-type: none"> • Neutral - Individual who was director of a state Dept of Beh Health and Developmental Disabilities to move individuals from facilities to “residential homes” (usually congregate) • Neutral - Another individual was a plaintiff’s expert in <i>Brown v. DC</i> (re: moving adults with physical disabilities from nursing facilities to the community)
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • N – project director and project lead are both “TBD”
4. Litigation
<ul style="list-style-type: none"> • Employment and malpractice litigation
5. Financial Viability
<ul style="list-style-type: none"> • Q – unsure how to interpret

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • N – the project director and lead are not identified • P – describes a mediation approach

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • Neutral – describes general communication strategy
<ul style="list-style-type: none"> • Q – says project lead and director are experienced in testifying, but doesn't identify them
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> • Q – the description that on-sites will use a list of questions for data aggregation – will there be qualitative reviews as well?
<ul style="list-style-type: none"> • P – they say they are able to produce ad-hoc reports
<ul style="list-style-type: none"> • Neutral – restates what's in the settlement agreement
<ul style="list-style-type: none"> • Neutral – states plan to set up regularly scheduled data requests and a process for ad hoc requests
<ul style="list-style-type: none"> • P – specifics about how to ensure State can participate in interviews
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • P – lists a reasonable format for providing comments on the state Implementation Plan
<ul style="list-style-type: none"> • N – review of workforce plan seems focused on checklist/hand-off approach
<ul style="list-style-type: none"> • Neutral – lists that it will do what is required by settlement agreement
<ul style="list-style-type: none"> • P – onsite and offsite reviews
<ul style="list-style-type: none"> • Neutral – says will notify Parties that it is their intent to review status of particular provision.
<ul style="list-style-type: none"> • Q – concern that this will make them less agile
<ul style="list-style-type: none"> • P – lists specific trauma-informed care training concepts
<p>D. Budget</p>
<ul style="list-style-type: none"> • Neutral – says will provide a budget
<p>E. Reports</p>
<ul style="list-style-type: none"> • Neutral – says will provide reports per terms and will gather input and use prior experience to create a comprehensive template
<ul style="list-style-type: none"> • Neutral – says will provide final compliance report
<ul style="list-style-type: none"> • P – discusses baseline and goals measured against baseline. Discusses ways to measure and document progress
<ul style="list-style-type: none"> • Neutral – says will follow schedule and update Parties if there are problems
<ul style="list-style-type: none"> • Neutral – will gather feedback and discuss any needed changes
<ul style="list-style-type: none"> • Positive – will track ad hoc report requests
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • N – does not identify a lead individual, speaks of general experience of organization
<p>G. Technical Assistance</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Columbus Medical Services, LLC dba The Columbus Organization

DATE: 3/19/25; 3/20/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none">• Neutral – states requirement and that will create work plan if needed
<ul style="list-style-type: none">• Positive – will provide technical assistance to include (relevant areas)
H. Confidentiality Requirements
<ul style="list-style-type: none">• Positive – has insurance policies
<ul style="list-style-type: none">• Positive – has data privacy protocols
<ul style="list-style-type: none">• Positive – has processes to comply with laws about confidential information
<ul style="list-style-type: none">• Positive – will follow IT Service contract
I. Reports
<ul style="list-style-type: none">• Neutral – lists requirements
2. Staffing
<ul style="list-style-type: none">• N – does not identify a lead, just has a generic requirement of what skills this person must have• N - Says uses consultants in other projects but no specifics• N - Describes minimum staffing – does not name project director or project lead
3. Implementation - Work Plan
<ul style="list-style-type: none">• N - Timeline that includes general requirements but does not go beyond listing requirements of agreement. No synthesis or detail.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Inspired Consulting Group, LLC
DATE: 3/23/25-3/31/25
EVALUATOR NAME: Dean Bugaj
EVALUATOR DEPARTMENT: DHHS/OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Bidder has 25 year history delivering and supporting the delivery of behavioral health services from direct service to administrative support at community-based organizations and hospital level of care, including rural health communities.• P – Bidder is a licensed clinical social worker and was the executive director of Maine Chapter of the national Association of Social Workers.• P – Bidder has experience in program evaluation, quality monitoring, and regulatory analysis as components of his work.• N – Bidders experience lacked specificity in experience on research, statistics, and data analysis – though the skills were referenced in the context of other activities.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Bidder has a 25 year history delivering and supporting behavioral health services in Maine.• Bidder has direct experience delivering EPSDT services• Bidder has experience as a certified Diversity, Equity, Inclusion and Belonging consultant and understands the overrepresentation of LGBTQIA+ youth and families in behavioral health, child welfare, and criminal justice systems.• Q – unclear how his DEIB experience qualifies him to review ISPs as stated.• Bidder notes 25 year history of mediation, conflict resolution and problem solving to facilitate difficult conversations amongst diverse stakeholders. Noted will apply structured conflict resolution methodologies.• Described two projects that seem relevant, including Clinical Director of Wings delivering High Fidelity Wraparound services, and consultant to DOJ on an individual case involved with Criminal Justice system.
2. Subcontractors
<ul style="list-style-type: none">• Bidder will use subcontractors to fulfill necessary roles of IR.
3. Project Team Organizational Chart
<ul style="list-style-type: none">• Org Chart supplied – Administrative Coordinator and two engagement specialists vacant.
4. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/23/25-3/31/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Bidder supplied profit and loss for 2020-2023, showing steady increase in profitability over that period.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> • P - Bidder noted SMART goals and described an understanding of the review process. • N – Bidder did not indicate they understood the IR's role in working with the Parties evaluating compliance with the Settlement Agreement.
<ul style="list-style-type: none"> • P – Bidder noted collaborative engagement, structured conflict resolution, partnership and coordination, and transparency and follow-up in problem solving.
<ul style="list-style-type: none"> • I – Bidder notes they will meet the requirements and described how they will meet it.
<ul style="list-style-type: none"> • I – Bidder notes they will testify as needed with integrity and neutrality supported through detailed reporting and documentation.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • I – Bidder noted they would complete ad-hoc reporting and noted their process for such requests.
<ul style="list-style-type: none"> • P – Bidder described they will have structured data requests, collaborative coordination, confidentiality and compliance, verification and clarification on data selection and retrieval.
<ul style="list-style-type: none"> • I – Bidder described how they will meet the requirement through Advance notification, transparent scheduling, documentation and confirmation, accommodation and coordination, and protocol adherence.
C. Additional Requirements
<ul style="list-style-type: none"> • I – Bidder notes they will meet the requirements and described the various elements – structured review protocol, collaborative team analysis, actionable feedback, and efficient reporting.
<ul style="list-style-type: none"> • I – Bidder notes they will meet the requirements and described the various elements – structured review process, evaluation criteria, stakeholder input, reporting and recommendation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 3/23/25-3/31/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

<ul style="list-style-type: none"> • I – Bidder notes they will meet the requirements and described the various elements – structured review process, key evaluation criteria, and annual review/continuous improvement.
<ul style="list-style-type: none"> • I – Bidder notes they will meet the requirements and described the various elements that will aid them in policy review, process review, and evaluation criteria. • P – Bidder noted for recommendations they would utilize a collaborative feedback process will be established, allowing the Parties to review proposed recommendations, seek clarifications, and implement necessary adjustments.
<ul style="list-style-type: none"> • P – Bidder noted an open line of communication with the Parties enabling prompt investigation of any compliance concerns. Noted a dynamic monitoring schedule, described the multimethod compliance assessment, and noted findings and corrective action items.
<ul style="list-style-type: none"> • P – Bidder noted the Trauma informed Care Framework, included Interview and Interaction protocols, training and support for interviewers, and confidentiality and ethical considerations.
<p>D. Budget</p>
<ul style="list-style-type: none"> • I – Bidder acknowledged submitting budgets in subsequent periods 120 calendar days prior and described their budgeted development process. budget components, and review and approval processes.
<p>E. Reports</p>
<ul style="list-style-type: none"> • I – Bidder states they will meet the intent, provided annual report development process, report structure, and submission/public dissemination.
<ul style="list-style-type: none"> • P – bidder proposed a structure for the final report (Executive Summary, Comprehensive Compliance Assessment, Data and Outcome Analysis, Stakeholder perspectives, Sustainability and Recommendations).
<ul style="list-style-type: none"> • I – Bidder states they will meet the intent, describes the report structure and notes how they will do each component, including review and submission.
<ul style="list-style-type: none"> • I – Bidder states they will meet the intent and described their final report review and integration process, including revision and QA leading to submission.
<ul style="list-style-type: none"> • I – Bidder noted they will collaborate with parties to determine necessity and scope of ad-hoc reports.
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • I – Bidder states they will meet the intent and noted other key roles as well, assuring professional development in best practices compliance standards, and data analysis methodologies
<ul style="list-style-type: none"> • P – Bidder has direct experience with Medicaid and EPSDT, provision of services in rural areas.

**STATE OF MAINE
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EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

N – This section lacked detail on how they have met each of the identified areas.
G. Technical Assistance
<ul style="list-style-type: none">• I – Bidder acknowledges TA in required areas and described their strategy for engagement in family home service availability, supporting Informed choice for families, identifying barriers to family home placement, and facilitating reasonable modifications.
<ul style="list-style-type: none">• P - Bidder noted they would assess current service models and recommend “best fit” methodologies, standardized interventions, and use of technology to support delivery. Bidder referenced implementation science frameworks and key performance indicators.• P – The bidder noted TA related to implementation of EBPs, recommendations on Continuous Improvement and quality assurance, training policy and curricula, service planning, reasonable modification process, and sustainability.
H. Confidentiality Requirements
<ul style="list-style-type: none">• Bidder described how they would comply with the Rider B-IT requirements• Bidder described how the IR would comply with RA-1 and RA-5 procedures.• Bidder noted they would comply with all state and federal laws on confidentiality including HIPAA, FERPA. Bidder described access control measures, storage and breach notification.• Bidder noted they have a confidentiality framework including data access control, secure data storage, and data transmission security. Noted they will have confidentiality agreements, mandatory security training and ongoing compliance audits. Also noted they have a data breach protocol and will comply with notification protocols should a breach occur.
I. Reports
<ul style="list-style-type: none">• I – Noted project manager is responsible for assuring report for organizing, tracking and managing workflows to assure reports are tracked and submitted timely. Note tracking will be maintained through a central database, and the project manager will have risk identification, issue resolution, QA, and process optimization protocols.
2. Staffing
<ul style="list-style-type: none">• I – Job descriptions attached with relevant duties and qualifications for each role. Staffing plan outlines FTE requirement for all core roles, including .5 FTE for the IR Lead.• P – Bidder noted how they will leverage subcontractors but also described their selection an contracting process, oversight and accountability measures,

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EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

compliance and quality assurance, integration and collaboration, and conflict resolution and issue management of all subcontractors.

3. Implementation - Work Plan

- I - Workplan supplies as Gantt chart. Activities appear relevant, but chart seems high level and lacks further detail.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/28/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• 25 year career in various settings, mostly in administration of programs• Consulting from 2020 onward• AVP of Ped Services at Northern Light from 2015-2022
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Qualifications and History of Bidder<ul style="list-style-type: none">○ Over 25 years of direct service, leadership, and systems-level expertise across clinical, educational, and community-based BH settings○ Clinical Director for Wings for Children and Families○ Oversight of service delivery, compliance monitoring, and stakeholder engagement○ Northern Light Acadia○ Data-driven decision-making and CQI○ ED of Maine Chapter for National Association of Social Workers○ Experience in Medicaid regs, EPSDT, community-based services○ Skills in mediation, conflict resolution, and collaborative problem-solving○ Served as BH expert consultant with DOJ• Familiarity with Medicaid rules, etc.<ul style="list-style-type: none">○ Overseen monitoring of EPSDT-related BH services○ Evaluated medicated-funded community and hospital based services○ Experienced in Medicaid regs especially around EPSDT and community-based services○ Was a provider of Wraparound services• Work directly with disability service providers, etc.<ul style="list-style-type: none">○ Certs in diversity and inclusion from Cornell○ Led trainings and consultations○ Led DEI&B training programs tailored to BH, education, healthcare, and CW orgs○ Trauma-informed system of care○ Partnered with disability rights orgs○ Special experience working with LGBT youth

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 3/28/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> ○ Can analyze ISPs and do stakeholder interviews and comprehensive case reviews with sensitivity and insight ● Mediation and Conflict Resolution <ul style="list-style-type: none"> ○ Facilitated difficult conversations and mediated complex conflicts ○ Structured conflict resolution methods ● Two Projects: <ul style="list-style-type: none"> ○ Wings for Children and Families – Clinician Director hired in 2006 <ul style="list-style-type: none"> ▪ Extensive clinical oversight and program development across a multi-county region ○ DOJ – Pediatric BH Expert Consultant
2. Subcontractors
<ul style="list-style-type: none"> ● Amanda Sidell – program evaluator ● Elizabeth Keenan – PM
3. Project Team Organizational Chart
<ul style="list-style-type: none"> ● Will hire for admin coordinator and two engagement specialists
4. Litigation
<ul style="list-style-type: none"> ● none
5. Financial Viability
<ul style="list-style-type: none"> ● Finances of a small org

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> ● Methodology: <ul style="list-style-type: none"> ○ collaborative data gathering and analysis, overseen by Program Evaluator ○ onsite assessment conducted by IR, program evaluator, and engagement specialists ○ documentation and reporting: detailed records of all data collected ● Actionable Steps and Recs: <ul style="list-style-type: none"> ○ All reports using SMART recommendations, reports including guidance to address compliance gaps, improving service accessibility, and enhancing fidelity ● Role of IR <ul style="list-style-type: none"> ○ Proactively monitor compliance ○ Regular review cycles, performance indicators, and structured feedback loop

**STATE OF MAINE
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EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> ○ Facilitate stakeholder meetings to review progress and address emerging issues
<ul style="list-style-type: none"> ● Collaborative engagement: regular meetings, platform for open dialogue, mutual trust transparency and respect ● Structured conflict resolution: evidence-based mediation and conflict res ● Partnership and coordination: proactive comms with IC and state, communicate actionable steps for state ● Transparency and follow-up: document and disseminate action steps, use program evaluator's analysis and findings to guide discussion
<ul style="list-style-type: none"> ● Structured and transparent protocol for ex parte comms, standardized procedures ● Ex parte comms documented ● PM will support oversight and monitoring of ex parte comms ● Ex parte comms will have clear purpose and scope
<ul style="list-style-type: none"> ● Clear and credible expert testimony ● Draft from comprehensive reports, eval outcomes, and documented compliance assessments ● Impartial, objective, and ethical
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> ● Identification of data elements and analysis methodology: identify specific data elements, methodology will include statistical analyses and qualitative data gathering ● Data collection analysis and reporting: structured protocols, tools and instruments, mixed method approach, timely and transparent reporting
<ul style="list-style-type: none"> ● Articulated ad-hoc report process, determine capacity and logistics, report out
<ul style="list-style-type: none"> ● On site inspections – structured site visit protocols ● Review ISPs and other program documents ● Use profuse quantitative methods to assess performance ● Structured, trauma-informed interviews ● Review cases ● Complete surveys and focus groups ● Incorporate additional methodologies
<ul style="list-style-type: none"> ● Develop standardized data request protocols ● Coordinate with data liaisons to facilitate smooth and timely data transfer ● Adhere to confidentiality regulations ● Process for verification and clarification of data ● Provide TA around data reporting procedures

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/28/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> Advanced notification, transparent scheduling, documentation, accommodation, adhere to all protocols
C. Additional Requirements
<ul style="list-style-type: none"> Structured review protocol, engage in collaborative team analysis, provide actionable feedback, and complete efficient reporting
<ul style="list-style-type: none"> Structured review process, determine evaluation criteria, engage in stakeholder input and qualitative assessment, complete reporting and recommendations
<ul style="list-style-type: none"> Systematic review of proposed training and curricula within twelve months and annual thereafter Structured review process, determine key evaluation criteria, complete annual review and continuous improvement
<ul style="list-style-type: none"> Systemic review of policies, processes, and procedures Structured review process, key eval criteria (compliance assessment, effectiveness review, operational impact, DEI&B and Trauma-informed considerations, feedback and recommendations
<ul style="list-style-type: none"> Ongoing compliance monitoring, multi-method compliance assessment, Issuance of findings and corrective action
<ul style="list-style-type: none"> Trauma-informed care framework – 6 core principles Interview and interaction protocols Training and support for interviewers – continuous training Adherence to confidentiality and ethical considerations
D. Budget
<ul style="list-style-type: none"> Will prepare budget for contract renewals PM will oversee process, develop a timeline Factoring in personnel costs, op expenses, travel and on-site review costs, and training and PD, technology and data mgmt.
E. Reports
F. Experience and Qualifications
<ul style="list-style-type: none"> Lead Individual will work for no less than .5 FTE Supporting team of Program Evaluator, Project Manager, Engagement Specialists, and Admin Coordinator May engage external consultants as needed
<ul style="list-style-type: none"> IR has experience overseeing and evaluating Medicaid-funded BH programs and EPSDT programs Worked on implementation and oversight across multiple rural regions

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/28/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none">• Exp advising state agencies to implement BH and community-based BH initiatives, and JJ and CW systems
G. Technical Assistance
<ul style="list-style-type: none">• TA strategy:<ul style="list-style-type: none">○ Assuming that children can be served in a family home○ Assess communication and decision-making processes○ Identify barriers to family home placement○ Facilitate reasonable modifications where possible• Formal report to the state outlining identified barriers, best practices, and concrete recommendations• Implement TA recommendations in a phased and structured manner• Conduct follow up on effectiveness of TA strategy
<ul style="list-style-type: none">• Will provide TA as required in the RFP
H. Confidentiality Requirements
<ul style="list-style-type: none">• Will maintain insurance coverage
<ul style="list-style-type: none">• Will implement data security and risk management framework
<ul style="list-style-type: none">• Will implement role-based access, secure data storage, NDAs
<ul style="list-style-type: none">• Will adhere to confidentiality requirements
I. Reports
<ul style="list-style-type: none">• Project manager will manage reports, will develop project plan which includes reporting
2. Staffing
<ul style="list-style-type: none">• Job descriptions included: IR, Admin coordinator, Program evaluator, PM, engagement specialist• PM as point person for subs• IR at .5 FTE, evaluator at .2 FTE, PM at .15 FTE, engagement specialists (3 positions) at .225 FTE, admin coord at .15 FTE. Total FTE = 1.675 FTE
3. Implementation - Work Plan
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Inspired Consulting Group, LLC
DATE: 3/23/25
EVALUATOR NAME: Kristen McAuley
EVALUATOR DEPARTMENT: Maine DHHS / OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Lead is noted as 25 years experience in providing clinical care, acting as a administrator, and in advocacy. Specific timelines are provided in examples a & b. Example a includes provision of services in a rural area and Example b include administration / funding / systems transformation.• P – Notes extensive training, consultation, and facilitation for BH and Edu institutions.• P – As Clinical Director for “wings” – compliance auditing and evaluation of behavioral health service delivery. As AVP for NLH – oversight and evaluation of pediatric BH, data driven analysis and compliance with Medicaid.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – Extensive direct service, leadership and systems experience/improvement. Three primary positions noted which are of pertinence to the RFP / service. Also note role as “behavioral health expert consultant with DOJ re: you in criminal justice system.”• P – Expertise includes EPSDT, H&CBS / Medicaid Reimbursement.• P/N – Appreciate the detail re: accurate assessments, alignment with federal requirements, etc. Not as detailed or doesn’t address system-level transformation also part of the Agreement.• P – Direct experience with providers, advocacy orgs., trauma-informed systems of care, etc.• P/N – Lists structured approach to conflict resolution (empathy/active listening/collaborative problem solving). Not overly detailed or concrete, though.• Two projects listed, one of which was direct experience as clinical provider, the other as DOJ consultant.
2. Subcontractors
<ul style="list-style-type: none">• P - Two subcontractors listed (Program Evaluator, Project Mgr). Well articulated section, roles are clear and pertinent experience.
3. Project Team Organizational Chart
<ul style="list-style-type: none">• Provided
4. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/23/25

EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none"> • Provided
5. Financial Viability
<ul style="list-style-type: none"> • Provided, all years with profit.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P – Really appreciate the structure/outline. It is clear, articulate, and pertinent to the RFP.
<ul style="list-style-type: none"> • P – Again, structure is clear, presents a precise approach, etc. • N – Doesn’t address relationship between Parties under the Agreement.
<ul style="list-style-type: none"> • P – Structured, clear approach, which includes the role of different staffs in upholding elements. • N – Similarly, unsure if dynamics between the Parties is articulated.
<ul style="list-style-type: none"> • P – Articulated elements go beyond the immediate element (testifying) but highlights the scaffolding which will support such.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P/N – Specific data elements identified, though sometimes in a generic way that could have benefited from more detail (i.e., service utilization statistics – what service, what type of utilization). • Acknowledge requirements of RFP in regard to timelines and updating.
<ul style="list-style-type: none"> • P – Outlines steps taken to consider any ad hoc analysis.
<ul style="list-style-type: none"> • P/N – Incorporates elements and expectations of pertinent section, though would have been strengthened by deeper detail. For example, how will ISPs be reviewed, or how will locations for on-site inspections be identified.
<ul style="list-style-type: none"> • P – Appreciate detail regarding a structured request process that note protocol and consideration for confidentiality and verification. Solid data process.
<ul style="list-style-type: none"> • P – Again, clear and detailed. Appreciate elements of “protocol adherence.”
C. Additional Requirements
<ul style="list-style-type: none"> • P – The “how” of providing commentary is clear and articulates a depth of approach. Appreciate details and components such as collaborative analysis and actionable feedback.
<ul style="list-style-type: none"> • P – Third and fourth detailed element – seeking feedback from providers and providing recommendations – is a robust element / recommendation.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/23/25

EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none"> • P – Similar to the above section, certain elements – including portions of the key evaluation criteria (current research, legal requirements) and CI – are concrete and bolster the approach.
<ul style="list-style-type: none"> • P/N – Again, consistently clear, structured and detailed. Though, still unclear regarding consideration for the roles and interests of Parties under the Agreement.
<ul style="list-style-type: none"> • P – Appreciate the detail regarding various levels of compliance, including multi-method compliance (i.e., document review, partner engagement).
<ul style="list-style-type: none"> • P – Excellent, in-depth, on point response.
<p>D. Budget</p>
<ul style="list-style-type: none"> • P – Well articulated section that goes beyond acknowledgment.
<p>E. Reports</p>
<ul style="list-style-type: none"> • P – Appreciate the detail regarding report structure and content, as well as the thoughtfulness regarding public dissemination.
<ul style="list-style-type: none"> • P/N – Same as above, thought not as clear regarding the details how compliance will be measured.
<ul style="list-style-type: none"> • Appropriate acknowledgement of timelines and process.
<ul style="list-style-type: none"> • P – Appreciate the detail re: the finalization and submission process, including “structured response document.”
<ul style="list-style-type: none"> • P – Similarly, structured approach with clear steps/detail.
<ul style="list-style-type: none"> • P – Appreciate the detail and ability to step into ad hoc reports though some of the section is not as clear or articulate as in other portions under the Report section.
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • Q – Previous section (Part IV?) provided more specifics regarding the individuals (background, skills) that will step into the named positions. Unclear why this section is more acknowledgement of expectations rather than confirmation of details specific to the known individuals.
<ul style="list-style-type: none"> • Acknowledgement of requirements.
<p>G. Technical Assistance</p>
<ul style="list-style-type: none"> • P – Note provision of direction TA, with strategy well-articulated.
<ul style="list-style-type: none"> • P – Well articulated section, and appreciate details that include incorporation of EBP into real world implementation, KPIs for CIQA, etc.
<p>H. Confidentiality Requirements</p>
<ul style="list-style-type: none"> • Acknowledgement of requirements.
<ul style="list-style-type: none"> • Acknowledges different types of compliance.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 3/23/25

EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none">• P – Detailed and comprehensive approach to multiple types of confidentiality areas.
<ul style="list-style-type: none">• P – Similarly, detailed and articulate.
I. Reports
<ul style="list-style-type: none">• P/N – Nuances between the two different sub-sections are not addressed, though there is reference to coordination and tracking of elements needed for reporting
2. Staffing
<ul style="list-style-type: none">• P – Job descriptions are included.• P – Appropriate description of subs/consultants.• N – For both a and b, unclear / more detail would have been helpful re: known staff.• P – Well articulated.
3. Implementation - Work Plan
<ul style="list-style-type: none">• I – Three different graphics are included, and appreciate the different levels of categorizing different workflows.• N – Overall, though, detail is relatively sparse, especially compared to other sections that are much more articulate and clear.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Inspired Consulting Group, LLC
DATE: 23MAR2025
EVALUATOR NAME: Sara Olsen
EVALUATOR DEPARTMENT: DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P - Demonstrated 8 years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, specifically, administration, funding, and delivery of services. Demonstrated 8 years of program evaluation of Community-Based Services for Children with Behavioral Health Disabilities.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – experience in ME with direct service provision, compliance monitoring, administration of programs and services;• N – states experience but limited on details;• P - experience managing and evaluating Medicaid-funded Community- and Hospital-Based Services;• P – (file 1) system-wide transformation efforts to expand community based behavioral health services;• P – developed and managed regional care coordination programs, implemented new services, and systematically evaluated program effectiveness;• N – conflict resolution skills related to RFP section does not contemplate conflicts between the Parties;• P – experience working with variety of stakeholders including providers and families
2. Subcontractors
<ul style="list-style-type: none">• P – tied subcontractors’ experience to expected roles in this project
3. Project Team Organizational Chart
<ul style="list-style-type: none">• P
4. Litigation
<ul style="list-style-type: none">• P
5. Financial Viability
<ul style="list-style-type: none">• P

Part IV, Section III. Proposed Services
1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 23MAR2025

EVALUATOR NAME: Olsen

EVALUATOR DEPARTMENT: DOJ

Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> • P – clear description of how compliance evaluation will be broken down by task and role; • P – identifies regular stakeholder meetings but and regular Parties meetings (in A.2.); • P – recommendations will be framed in SMART framework
<ul style="list-style-type: none"> • P – outlined approaches to conflict resolution and problem-solving in clear manner; • Q – what are the evidence-based methods being proposed?; • I/N – focus on potential conflicts across stakeholders when section asks specifically about Parties
<ul style="list-style-type: none"> • P – testimony will draw from notes and documented compliance assessments; • P – adhere to impartiality
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P – provided examples of data
<ul style="list-style-type: none"> • P – description of ad-hoc analysis plan
<ul style="list-style-type: none"> • P – plans include a wide variety of stakeholders
<ul style="list-style-type: none"> • P – establish standard requests and timelines; • P – regular meetings and mechanisms to identify discrepancies
<ul style="list-style-type: none"> • P – maintain shared interview calendar; document confirmation
C. Additional Requirements
<ul style="list-style-type: none"> • P – feedback focused on strengths, areas of improvement, potential compliance gaps, concrete recommendations
<ul style="list-style-type: none"> • P – clearly understands how to evaluate workforce capacity
<ul style="list-style-type: none"> • P – key evaluation criteria relevant to training best practices, intended content, and SA
<ul style="list-style-type: none"> • P – clear evaluation criteria and process
<ul style="list-style-type: none"> • P – outlined interview protocols
D. Budget
<ul style="list-style-type: none"> • P – detailed sections of the budget that would be provided
E. Reports
<ul style="list-style-type: none"> • P – detailed and clear; • P – included report structure
<ul style="list-style-type: none"> • P – maintain integrity and accuracy of report (neutrality)
F. Experience and Qualifications
<ul style="list-style-type: none"> • P – described which individual had experience related to topics listed in RFP

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 23MAR2025

EVALUATOR NAME: Olsen

EVALUATOR DEPARTMENT: DOJ

G. Technical Assistance
<ul style="list-style-type: none">• P – understands informed choice
H. Confidentiality Requirements
<ul style="list-style-type: none">• P – regular team cybersecurity training
I. Reports
<ul style="list-style-type: none">• P
2. Staffing
<ul style="list-style-type: none">• Extremely detailed job descriptions with responsibilities and qualifications
3. Implementation - Work Plan
<ul style="list-style-type: none">• P

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Inspired Consulting Group, LLC
DATE: 3/31/25
EVALUATOR NAME: Nonny Onyekweli George
EVALUATOR DEPARTMENT: US DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none"> • Y • 8 years of experience • Clear experience in system-wide transformation

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • P: experience at Northern Light Acadia • P: experience stakeholder • P: experience with implementation and compliance monitoring of EPSDT-related behavioral health services • P: provider of managing community-based behavioral health programs • Q: experience transitioning individuals – maybe Wings p. 5 • P: experience negotiating and attending trainings • Q: Role in “bringing children home from out of state placements”
2. Subcontractors
<ul style="list-style-type: none"> • P: reviewing ISPs; experienced at a major hospital • P: program manager
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • P: adequate
4. Litigation
<ul style="list-style-type: none"> •
5. Financial Viability
<ul style="list-style-type: none"> • P: sufficient

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P: regular on site interviews • P: SMART recommendations p. 2 • P: structured and transparent protocol • P: understanding of ex-parte communications

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/31/25

EVALUATOR NAME: Nonny Onyekweli George

EVALUATOR DEPARTMENT: US DOJ

B. Assessment Methodology Plan
<ul style="list-style-type: none">• P: time built in to identify data elements• P: ad hoc requests process analysis; workflow is clear• P: flexible methodological adaptations• P: ensuring counsel is present; advance notification, scheduling p. 9
C. Additional Requirements
<ul style="list-style-type: none">• P. actionable feedback (ensure comments reference SA) p. 10• P: multi-method compliance assessment
D. Budget
<ul style="list-style-type: none">• P: additional information provided- on site interviews taken into consideration
E. Reports
<ul style="list-style-type: none">• P: consideration of redactions p. 17• P: structure and content of report
F. Experience and Qualifications
<ul style="list-style-type: none">•
G. Technical Assistance
<ul style="list-style-type: none">• P: structured approach
H. Confidentiality Requirements
<ul style="list-style-type: none">• P: types of insurance coverage, goes over and beyond
I. Reports
<ul style="list-style-type: none">•
2. Staffing
<ul style="list-style-type: none">• Core team more than more than 1.5 FTE o. 47
3. Implementation - Work Plan
<ul style="list-style-type: none">• P: Gantt charge headers- responsible party and start and end month

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Inspired Consulting Group, LLC
DATE: 3/21/25, 3/28/25, 3/31/25
EVALUATOR NAME: Victoria Thomas
EVALUATOR DEPARTMENT: USDOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – has direct experience providing community-based services to children with behavioral health disabilities• P – has direct experience with these services in Maine• P – has experience with children’s behavioral health service providers in Maine and workforce development• P – has experience with child welfare• P – has experience with juvenile justice• P – has experience providing relevant services in rural parts of Maine• P – has direct experience transitioning children with behavioral health disabilities from Out-of-Home Placements to Family Homes• P – experience doing qualitative reviews of Individualized Service Plans• P – experience evaluating inpatient and community-based services, including review of data and compliance with Medicaid• P – experience making recommendations for community-based service providers and schools• P – experience evaluating data reviews and gathering stakeholder feedback related to behavioral health services and workforce development.

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – longstanding commitment to and experience with the relevant population• P – prior leadership roles with multiple relevant Maine stakeholder organizations• P – training in mediation and conflict resolution• P – background in working with populations who experience multiple dimensions of marginalization• P – discussion of conflict resolution includes discussion of developing actionable solutions• P – project 1 directly relevant, including administration/providing children’s beh health services in the community, workforce development, and working with different stakeholders to transition children back home from facilities

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/21/25, 3/28/25, 3/31/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – project 2 directly relevant – developed a specialized program to serve a child with beh health needs and justice involvement to serve the child in the most integrated setting.
2. Subcontractors
<ul style="list-style-type: none"> • P – identifies an MSW/LCSW to do ISP reviews and conduct on-site evaluations • P identifies an MBA project manager • Q – unclear if project manager’s experience is on point. Background in healthcare, human resources and Diversity, Equity, and Inclusion • Plans for three additional subcontractor roles – admin coordinator, and two engagement specialists
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Filled requirement
4. Litigation
<ul style="list-style-type: none"> • N/a
5. Financial Viability
<ul style="list-style-type: none"> • Financially viable

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P – organized description of establishing communication channels with all parties to gather qualitative and quantitative data based on ISPs, performance metrics, compliance audits, etc.; on-site assessments, detailed records ensuring confidentiality. Described findings including SMART recommendations stating actionable steps for state to reach compliance, including enhancing service fidelity. Includes briefings and reports.
<ul style="list-style-type: none"> • P- specific methodology for resolving conflicts among stakeholders • I – reference to “any parties”
<ul style="list-style-type: none"> • P – establishment of protocols for communications, including with State counsel
<ul style="list-style-type: none"> • P – clear understanding that testimony may include legal proceedings. Clear methodological approach, data analyzed, and bases for conclusions and recommendations. • P – demonstrates importance of clearly explaining complex findings to diverse audiences

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/21/25, 3/28/25, 3/31/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – recognizes the importance of clear and credible testimony to support compliance
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> • P - Clear organization; structured protocols and tools. Mixed method approaches with qualitative thematic coding. Reporting will outline compliance status, identify gaps and provide actionable recommendations based on specific agreement requirements/metrics. • Q – is clear that the plan goes to the Parties – but is there understanding who the parties are?
<ul style="list-style-type: none"> • P – clear process for ad hoc requests; recognition that workload, resources and timelines will have to be evaluated to ensure feasibility of accurate and timely ad-hoc analysis.
<ul style="list-style-type: none"> • Describes variety of assessment methods; • Q – seems focused on quality of services, which is important, but part of the assessment will be whether children are able to transition from facility-based services to family homes.
<ul style="list-style-type: none"> • Organized description of data protocols
<ul style="list-style-type: none"> • P – description of shared calendar was smart • P – appreciated the focus on communicating during interviews why Department reps/counsel must be present.
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • P – specific process and review protocol
<ul style="list-style-type: none"> • P – reference recruitment and retention strategies; discussion of identifying patterns and compare to historical trends; includes reference to whether workforce strategies are improving access and timeliness • P – reference to quantitative and qualitative methods to contextualize workforce data and identify barriers
<ul style="list-style-type: none"> • P – names key evaluation criteria such as implementation of Wraparound, family engagement, and assessing effectiveness of training methodologies • P – use of Engagement Specialists to gather stakeholder feedback
<ul style="list-style-type: none"> • P – names key evaluation criteria, process for feedback and recommendations
<ul style="list-style-type: none"> • P – goal of early identification of compliance risks. • P – dynamic compliance monitoring schedule allowing for targeted reviews based on emerging issues, stakeholder concerns, evolving data trends
<ul style="list-style-type: none"> • P – demonstrated thorough understanding of Trauma Informed Care and how to implement it
<p>D. Budget</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/21/25, 3/28/25, 3/31/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – includes detailed description of what the budget will involve and the process
<p>E. Reports</p>
<ul style="list-style-type: none"> • P – helpful list of what goes into developing annual report • P – helpful proposed report structure that includes Exec summary, compliance analysis, data insights, stakeholder perspectives and recommendations.
<ul style="list-style-type: none"> • P – longitudinal data analysis of overall trends for final report • P – will be reviewing service sustainability with an eye “beyond the agreement’s term”
<ul style="list-style-type: none"> • P – similar to above, lays out comprehensive process. • P – methods to identify emerging challenges
<ul style="list-style-type: none"> • P – will incorporate feedback while maintaining integrity and accuracy of the report. • P – addresses possibility that the independent reviewer may not agree with all comments, and will provide a response if so
<ul style="list-style-type: none"> • P – quality control check, maintain transparency with parties re: responses to comments or non-adoption of comments. Focus on deadlines to stay on track
<ul style="list-style-type: none"> • P – foresees the possibility that ad hoc reports may be needed/requested to do with challenges
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • Lead individual = .5 FTE. • P – may include external consultants if additional expertise in particular areas is needed
<ul style="list-style-type: none"> • P – listed the categories of knowledge (providing Medicaid-funded community-based services to individuals with disabilities; advising public agencies on program implementation of Community-Based Services for Children with Beh Health Disabilities, Trauma informed care
<p>G. Technical Assistance</p>
<ul style="list-style-type: none"> • P – shows thorough understanding of potential issues that could impact parental choice and placement, and that the goal of this technical assistance is “aligning service planning with the core principles of the settlement, ensuring that children receive services in the least restrictive. . .” • Q – “most supportive environment possible”
<ul style="list-style-type: none"> • Other technical assistance • P – reference to implementation science frameworks to guide the State in translating research-based approaches • P – decision making protocols

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Inspired Consulting Group, LLC

DATE: 3/21/25, 3/28/25, 3/31/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none">• P – sustainability strategies to maintain improvements after the agreement is over
H. Confidentiality Requirements
<ul style="list-style-type: none">• P – described types of insurance• P – noted general risk mitigation strategies to ensure operational continuity
<ul style="list-style-type: none">• P – detailed policy and procedures related to risk identification, vulnerability scanning. Very thorough• P – details about encrypting data when stored and when transmitted
<ul style="list-style-type: none">• P – noted specific confidentiality laws, e.g., FERPA
<ul style="list-style-type: none">• P – included confidentiality framework, security training for all team members and subcontractors
I. Reports
<ul style="list-style-type: none">• N – only partly responsive to the question – notes that Project Manager will be responsible for timelines, coordination, etc. But answer did not seem fully responsive (e.g., does not mention budget reports)
2. Staffing
<ul style="list-style-type: none">• P – job description of Independent Reviewer recognizes leadership role and importance of clear communication of progress of the State. Administrative coordinator has clear role planning site visits, organizing and maintaining records, etc. Program Evaluator will design program eval plans and methodologies, etc. Must have experience conducting program evals, within beh health, social services, or related fields. Project manager will have bird's eye view of goals, timelines, oversee project milestones and track them. Engagement specialist to work directly with stakeholders• P – detailed protocols and protections for contracting with subcontractors• Q – is this too big a staff?• Has a Gantt chart with who does what when
3. Implementation - Work Plan
<ul style="list-style-type: none">• P - The 3-yr work plan implementation timeline appears comprehensive and visually pleasing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Mid Coast Mediation & Notary, LLC
DATE: 3/23/25
EVALUATOR NAME: Dean Bugaj
EVALUATOR DEPARTMENT: DHHS/OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Bidder has experience as Guardian ad Litem through court appointed special advocates (CASA) program.• P – Bidder has 3 years experience on private mediation practice, emphasizing trauma informed strategies.• N – no direct experience in the provision of home and community-based services or facilitating or overseeing system-wide transformation.• P – Bidder noted conducting detailed assessments leveraging interviews and case evaluations for qualitative and quantitative data. Noted data driven decision-making with mediation, and noted a contract with USDA and UMaine’s Department of Agricultural Mediation program, ensuring compliance with financial and reporting requirements and assisting with monthly, mid-year, and annual reports.• N – Bidder did not sufficiently note an eight year history of experience in auditing, research, program evaluation, statistics, or data analysis of Community-Based Services for Children.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Mid Coast Mediation & Notary, LLC

DATE: 3/21/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• Bidder served as a GaL from 2017-2021, assessed behavioral health needs of children in this role<ul style="list-style-type: none">○ Qualitative and quantitative data gathering through interviews and case evals• Started private mediation practice in 2022, family and divorce mediation:<ul style="list-style-type: none">○ Creates parenting plans and custody schedules○ Practical knowledge of community-based services• Part of Court Alternative Dispute Resolution Services (CADRES) roster – mediation of family cases involving complex custody and parenting arrangements• No specific mention of service of rural areas• Does not appear that work experience covers experience needed specific to community-based services for children with behavioral health disabilities• Unclear what the relevance of the USDA and UMaine contract is w/r/t children with behavioral health disabilities or community-based services• Does not appear to meet the eligibility requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Mid Coast Mediation & Notary, LLC
DATE: 3/23/25
EVALUATOR NAME: Kristen McAuley
EVALUATOR DEPARTMENT: Maine DHHS / OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• Q – eight years is comprised of GAL, CASA and CADRES rosters. This is more complementary, or adjacent, to the necessary eligibility. Does not include direct experience in administration, funding or delivery, nor systems transformation. Unclear the direct correlation to the explicitly needed eligibility requirements• N – four years as a GAL includes collecting data, but not at a systems, audit / compliance level and specific to systems of care rather than the care for individuals.• P – Notes through USDA / Co-Ex, responsible for routine grant reporting.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Mid Coast Mediation & Notary, LLC
DATE: 23MAR2025
EVALUATOR NAME: Sara Olsen
EVALUATOR DEPARTMENT: DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• N - Did not demonstrate expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities or experience in auditing, research, program evaluation, statistics, or data (qualitative and quantitative) analysis of Community-Based Services for Children with Behavioral Health Disabilities

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: Mid Coast Mediation & Notary, LLC

DATE: 3/21/25

EVALUATOR NAME: Nonny Onyekweli George

EVALUATOR DEPARTMENT: US DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• Does not meet eligibility• Do not meet 1 A, b ,or c

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: Mid Coast Mediation & Notary, LLC
DATE: 3/20/25
EVALUATOR NAME: Victoria Thomas
EVALUATOR DEPARTMENT: USDOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• N – Guardian ad litem role is very individualized – not system-wide• N – CADRES mediation – may have learned about community-based services but did not directly provide• Q – references to rural are vague• N – Unclear that has 8 years of expertise/experience related to the provision of children’s behavioral health services or related.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: University of Connecticut
DATE: 3/23/25-3/31/25
EVALUATOR NAME: Dean Bugaj
EVALUATOR DEPARTMENT: DHHS/OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• I – Bidder has over 20 years experience with over 60 faculty and staff, but has been associated with UConn for only two years.• P – Bidder notes expertise in Medicaid financing and rate-setting, child welfare, behavioral health, implementation science, evidence-based practices, juvenile justice, infant & early childhood mental health, youth homelessness, strategic planning, evaluation, continuous quality improvement, and more.• P – Bidder noted individuals and their backgrounds on who will handle specific roles to this work. Individuals noted have specific experience related to the roles being filled.• P – Principal Investigator has direct experience in this line of work the past 4 years working with West Virginia, DC, Michigan, Rhode Island, and Nevada.• Q – With the principle investigator’s current work including serving as PI for a consent decree (RI) and settlement agreement (Nevada), is there sufficient bandwidth to be PI for this RFP?• I – Bidder noted they will subcontract for the Lead Individual related to this work. That subcontractor has 25 years experience in the children’s behavioral health field.• P – Bidder noted lead research and evaluator has nearly 27 years experience in this field. Lead researched additional worked with Maryland as part of its Center of Excellence, overseeing all research, evaluation, and CQI activities. Experience also includes supporting the program evaluation, quality service reviews, and monitoring activities for Innovations Institute’s contracts with the State of Nevada and the State of Rhode Island related to their U.S. DOJ settlement agreement and consent decree.• I – Work appears to be reliant upon the team to accomplish major tasks of this RFP, but individuals notes have extensive and specific experience for this work.
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• I – Overview did not describe innovations institute as a whole, but instead the individuals anticipated to be assigned to the project, their qualifications and background.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: University of Connecticut

DATE: 3/23/25-3/31/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

<ul style="list-style-type: none"> • I – responses showed an understanding of the role of the IR and how the individuals have experience related to the role (i.e. Medicaid/EPSDT, working with disability providers, mediation and conflict resolution) • Bidder noted a project that directly relates to work in this RFP: Consultation and Technical Assistance to Bradley Hospital as a result of the Consent Decree following DOJ findings. Second project is related through system assessment and review of Oregon’s Medicaid State Plan and waiver structure for children. This also includes development of Psych under 21 Level of Care assessments and anticipated technical assistance and SME consultation on policies, regulations, rates and requirements for Behavioral Rehabilitation Services.
2. Subcontractors
<ul style="list-style-type: none"> • Bidder noted use of one subcontractor as the Lead Individual
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • Org Chart supplied with all roles identified and notes additional staff available as business and infrastructure support and subject matter expertise.
4. Litigation
<ul style="list-style-type: none"> • 8 counts of litigation noted related to faculty and staff claims. 3 settled, 5 pending.
5. Financial Viability
<ul style="list-style-type: none"> • Using the balance sheet, Current ratio 2021 – 1.63, 2022 – 1.61, 2023 1.33

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P – bidder outlined their process to engaging the parties upon being retained for the work, including a kick-off meeting then individual meetings to get up to speed on current efforts, progress made, challenges, and unanticipated barriers. This also envisions and on-site multi-day meeting to engage in small group conversations, conduct on-site inspections, review individual records, and identify objectives and priorities. • P – bidder acknowledged complexity of the work to be accomplished and is interested in inter-agency coordination, policy, practices, resources, and approaches to accomplishing the work. • P – bidder noted Results Based Accountability (How much did we do, How well did we do it, Is anyone better off?)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Independent Reviewer

BIDDER NAME: University of Connecticut

DATE: 3/23/25-3/31/25

EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

<ul style="list-style-type: none"> • P – Bidder noted they will use shared goals and objectives to resolve disputes, stating they will work in small groups individually and together with the parties, including key stakeholders as necessary. Bidder noted seeking an outcome that will allow the state to comply with the agreement, and will leverage implementation science to help explore drivers and factors behind the encountered challenges.
<ul style="list-style-type: none"> • I -Bidder described how they will meet the requirement.
<ul style="list-style-type: none"> • I – Bidder noted they will use findings, be specific, concrete, and precise in testimony, being strengths-based noting areas of progress, noting challenges and areas of concern.
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> • P – Noted their minimum data analysis plan and they would work with the Parties to refine and define data elements, data definitions, numerators and denominators, time period, and how/when the data will be collected. • I – noted Results Based Accountability Approach to tracking benchmarks to answer how much was done, how well it was done, and if anyone is better off.
<ul style="list-style-type: none"> • I – bidder noted they will work with the Parties to identify an specific questions to answer and the need for answering those questions, and develop a realistic plan.
<ul style="list-style-type: none"> • I – Bidder noted will use a combination of electronic and paper file reviews, interviews, on-site inspections, surveys, and/or focus groups. • P – Bidder described potential tools to use, such as the New Jersey Children’s System of Care review tool, Baltimore placement review tool, Wraparound Fidelity Assessment System tools, the Practice Reform instrument, the Youth Transition Tool, and more, developed or co-developed by the Innovations Institute.
<ul style="list-style-type: none"> • P – Bidder noted they will assure all necessary documents are signed to they can receive PHI or PII. • I – Bidder noted they will work with the state for all requirements and assure they have a primary person for any data requests. • P – bidder noted they will seek to learn more about the Single Assessment once the process is implemented 1/1/26.
<ul style="list-style-type: none"> • I – bidder described how they will meet the requirement
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • I – bidder described how they will meet the requirement
<ul style="list-style-type: none"> • P – bidder noted their view will rely on adult learning theory, implementation science, trauma-informed care principles, and systems of care values.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

<ul style="list-style-type: none">• P – Bidder noted values and expectations in line with the Agreement, i.e. the state is able to furnish behavioral health services, agreement intended to prevent children from unnecessarily entering out of home placement, not compelling parents to accept services, children are able to have their needs met in a family home, and the state will furnish services in an individualized manner.
<ul style="list-style-type: none">• P – Bidder noted they will utilize a trauma informed approach grounded in National Child Traumatic Stress Network. Bidder described how they may approach interviews from a trauma informed approach (listen first, ask questions later).
D. Budget
<ul style="list-style-type: none">• I – bidder described they will meet the requirement
E. Reports
<ul style="list-style-type: none">• Q – Bidder noted will prepare the report 7.5 months prior to end date of the agreement and provided to Parties to review within 30 days, addressing comments in 15 days, the final report 9 months prior to end date. Report prep at 7.5 months already misses the 9 month deadline.
<ul style="list-style-type: none">• I – bidder described they will meet the requirement
<ul style="list-style-type: none">• I – Bidder noted they will work with the Parties to identify the specific questions, the need and purpose for answering the questions, the relevance of the questions to other work underway, and what it would take to be able to answer them.
F. Experience and Qualifications
<ul style="list-style-type: none">• I – Bidder noted their team structure and the consultant will work no less than .5 FTE.
<ul style="list-style-type: none">• P – Bidder noted experience developing 1915C waiver services and 1915i State Plan amendments for children with disabilities, supporting children at risk and in rural communities, and extensive experience working with or advising public agencies through work as a prior Deputy Commissioner for Child, Youth, and Family Services in Massachusetts. Also noted working with public child and family servicing agencies in Connecticut, Hawai'i, Kentucky, Maryland, Michigan, New Hampshire, Nevada, New York, North Carolina, Oregon, Rhode Island, and DC.• P – Bidder noted an implementation framework in three stages, pre-implementation, monitored implementation, and maintenance.
G. Technical Assistance
<ul style="list-style-type: none">• P – Bidder noted TA, but acknowledged Settlement agreement milestones and when data could be first available based on initiative implementation i.e. High-Fidelity wraparound and Single Assessment starting Jan. 2026.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Dean Bugaj

EVALUATOR DEPARTMENT: DHHS/OBH

<ul style="list-style-type: none">• P – Bidder noted data will be reviewed with assumption children can be served in a family home, families have informed choice, and reasonable modifications can be made consistent with the Agreement.
<ul style="list-style-type: none">• P – Bidder noted they are home to the National Technical Assistance Network for Children’s Behavioral Health, which has been studied and has peer reviewed evidence of effectiveness and improved outcomes.
H. Confidentiality Requirements
<ul style="list-style-type: none">• I – bidder described they will meet the requirement
<ul style="list-style-type: none">• I – bidder described they have policies in place that will meet the requirement
<ul style="list-style-type: none">• I – bidder described they will meet the requirement and noted they have safeguards to protect confidential and sensitive information.
<ul style="list-style-type: none">• I – Bidder described they will meet the requirement for Rider B IT- Section 30.
I. Reports
<ul style="list-style-type: none">• I – Bidder noted they will use tools in Microsoft Suite to support the activities, with the Lead Individual assuring reports are on time and include all necessary elements.
<ul style="list-style-type: none">• I – Bidder noted they will maintain a workplan that includes a timeline for the required reports.
2. Staffing
<ul style="list-style-type: none">• I – Job descriptions attached and appear relevant to the roles envisioned in the proposal• I – Subcontractor noted as Lead Individual who will be supervised by the Principal Investigator, holding them accountable to deliverables.• I – Staffing plan attached meeting requirements of RFP
3. Implementation - Work Plan
<ul style="list-style-type: none">• Work plan submitted – detailed and items appear relevant throughout the performance period. Also noted will engage colleagues for subject matter expertise (i.e. NWIC).

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: University of Connecticut

DATE: 3/28/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• PI is Deborah Harburger – many relevant and qualifying activities between 2007 to present• Lead Individual is Kelly English – more than 25 years of experience in children’s behavioral health, former MA DMH Deputy Commissioner• Collaborator is Avery Irons – providing training, TA, and policy support in child welfare, JJ, and behavioral health agencies• Jill Farrell will lead research and evaluation activities, many research activities for many years• Appears to be eligible
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Harburger – Dir. Of Policy and Financing at Innovations Institute<ul style="list-style-type: none">○ Consultant in over 19 states on CBHS array○ As PI and Proj Dir., helped to develop services and supports so that children with complex BH needs can remain in their homes and communities instead of OOH placements○ Working on implementation of settlement agreements re Olmstead and EPSDT violations• English – CIO for MA Soc’y for Prev. of Cruelty to Children<ul style="list-style-type: none">○ Leads MSPCC’s advocacy team○ Former Deputy Cmr for MA DMH○ Worked as contractor re remediation of lawsuit re EPSDT• Farrell – served as lead evaluator for programs for children, youth, and families<ul style="list-style-type: none">○ Worked with JJ, CW, and NH agencies at state and local levels• Irons – bg in CW and JJ orgs<ul style="list-style-type: none">○ Former training and TA Dir at NYS youth justice institute• Extensive policy and financing exp re Medicaid and rules and provisions re CBHS including EPSDT• Training and TA to states, family-run orgs, and providers on medicate rates for home and community-based services<ul style="list-style-type: none">○ Wraparound, mobile crisis and stabilization• Reviewed OR’s CBHS

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EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

- Worked on CCBHCs and QRTPs
- Extensive knowledge to support state to leverage various Medicaid authorities, financing strategies, and EPSDT requirements
- Bring a strong understanding of which levers are available through Medicaid to achieve compliance with the agreement, and which require other systems including those service and supporting children in family homes
- Partnered with Parent Professional Advocacy League
- English leads MSPCC, which is coordinating entity of Children's Mental Health Campaign
- Worked to stand up statewide network of ED diversion programs
- Worked closely with dirs. Of local departments of social services to navigate initial design of trive@25 initiative
- RI DCYF Project
 - Implementation of Consent Decree for noncompliance with ADA and Section 504
 - Transitioning children hospitalized to family settings with community-based services
 - Prevent children with BH needs from experiencing prolonged psych hospitalization
- OR Project
 - Holistic system assessment and financing review of OR Medicaid state plan and waiver structure for Children, youth, and young adults

2. Subcontractors

- Kelly English and MSPCC

3. Project Team Organizational Chart

- Org chart provided

4. Litigation

- Some litigation seemingly unrelated to the work in this proposal

5. Financial Viability

- UConn has strong financial viability

Part IV, Section III. Proposed Services

1. Services to be Provided

Part II

A. Independent Reviewer's Role and Authority

- Start with reviewing all materials, hold kick-off meeting with the parties
 - Specifically calls out Medicaid state plan amendment for mobile crisis
- Individual meetings with each party

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: University of Connecticut

DATE: 3/28/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> • On-site meeting prior to completion of assessment methodology plan <ul style="list-style-type: none"> ○ On-site inspection of children's residences and programs ○ Understand the state's planning efforts • Will then develop program evaluation methods, focused on process and outcome components <ul style="list-style-type: none"> ○ Using the Results-Based Accountability Method • IR should ensure accountability for change and ability to sustain the change
<ul style="list-style-type: none"> • Use of one-on-one and small group meetings • Use of implementation science
<ul style="list-style-type: none"> • Specific, concrete, and precise in testimony
<p>B. Assessment Methodology Plan</p>
<ul style="list-style-type: none"> • Trying to understand how the class will change as children age out of the agreement and how the term "pendency" is defined for this Agreement • Minimum data analysis will serve as foundation of assessment methodology plan <ul style="list-style-type: none"> ○ Will work with parties to refine and define the minimum data elements • Overlay results-based accountability framework to benchmarks, both process and quality as well as outcome measures • Plan to be on site multiple times each year
<ul style="list-style-type: none"> • Will work with parties to come up with realistic plan based on prioritized activities
<ul style="list-style-type: none"> • Will use electronic and paper file reviews, interviews, on-site inspection, surveys, and focus groups • Mentions specific tools: NJ system of care review tool, Baltimore city placement review tool, wraparound fidelity assessment system tools, etc. • Seek to learn more from single assessments after implemented on 1/1/26 <ul style="list-style-type: none"> ○ Recognizes challenges around single assessment at first
<ul style="list-style-type: none"> • Will work with the state to ensure data requests are correct • Will accommodate when state staff are interviewed
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • Will review within timeframes
<ul style="list-style-type: none"> • Methodology plan and workplan will incorporate semi-annual reports
<ul style="list-style-type: none"> • Training and curricula review will include lenses of adult learning theory, implementation science, trauma-informed care principles, and systems of care values
<ul style="list-style-type: none"> • When reviewing, will ask about history of the document, purpose, intended audience, and how it is meant to interface with others.

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INDIVIDUAL EVALUATION NOTES**

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DATE: 3/28/2025

EVALUATOR NAME: Andrew Eppich

EVALUATOR DEPARTMENT: Maine DHHS, Commissioner's Office

<ul style="list-style-type: none"> • Will review at any time
<ul style="list-style-type: none"> • Will use expertise of National Child Traumatic Stress Network (NCTSN)
D. Budget
<ul style="list-style-type: none"> • Will provide
E. Reports
<ul style="list-style-type: none"> • Will provide within timeframes
<ul style="list-style-type: none"> • Will come up with plan if ad hoc reports are requested
F. Experience and Qualifications
<ul style="list-style-type: none"> • Kelly English will be lead individual and .5 FTE • Supported by Harburger, Farrell, and Irons
<ul style="list-style-type: none"> • Medicaid-funded community-based services • Rural areas: western MA and Cape Cod and Islands. MD's eastern shore, rural St. Mary's county and Wicomico county • Deputy Cmr at MA DMH • Research assistant and clinician at BMC – study on PTSD symptoms of youth with burn injuries • Trauma-informed Care metric and assessment workgroup • Implementation science – activities that facilitate the uptake and sustainability of evidence-based and research-informed practices • Member of global implementation society
G. Technical Assistance
<ul style="list-style-type: none"> • Will be able to provide ongoing TA, use implementation science framework
<ul style="list-style-type: none"> • Home to national technical assistance network for Children's Behavioral Health
H. Confidentiality Requirements
<ul style="list-style-type: none"> • Will meet insurance requirements
<ul style="list-style-type: none"> • Has comprehensive data security practices and policies
<ul style="list-style-type: none"> • HIPAA privacy policies
<ul style="list-style-type: none"> • Will comply with confidentiality requirements
I. Reports
<ul style="list-style-type: none"> • Will report according to requirements and timelines
2. Staffing
<ul style="list-style-type: none"> • Job descriptions provided • Contracted consultant will be lead individual • Staffing plan provided, wonder if this is enough time from the Principal Investigator?
3. Implementation - Work Plan
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: University of Connecticut
DATE: 3/23/25
EVALUATOR NAME: Kristen McAuley
EVALUATOR DEPARTMENT: Maine DHHS / OBH

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Includes detail regarding organization (“Innovations Institute”) as well as PI (Harburger). At both organizational and individual level, extensive, pertinent experience, including care in rural areas, systems transformation, Medicaid, provision of care, etc.• P – Includes information for supporting team members, including contractor.• Q – PI is different than lead. While not pertinent to the Eligibility section, this will need to be further understood in subsequent sections. All listed individuals have specific examples and timelines of pertinent professional experience.• P – Name lead for “research and evaluation activities.” Specific timelines provided, details are not as explicit, but all work seems pertinent and applicable.

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – Four named staff with clear, well-articulated descriptions that are very appropriate in role and scope. Harburger has proximate experience working with other States with settlement agreements under Olmstead. Other identified staff likewise bring appropriate skills and background.• P – Noted depth of experience with EPSDT, H&CBS, Coordinated Care Organizations, and other elements of Medicaid rules / programming. Excellent first portion under description of how Medicaid knowledge will be leveraged – importance of early intervention, access to services, provider pool, challenges with rural transportation.• P – Diversity of experience with both children/families and providers. Unclear (?) re: experience with advocacy orgs.• P/N – Appreciate detail re: mediation, etc., though lacking specificity re: structured / articulated approach.• P – Two projects are quite pertinent.
2. Subcontractors
<ul style="list-style-type: none">• One sub listed with qualifications. I – Sub will be the Lead.
3. Project Team Organizational Chart
<ul style="list-style-type: none">• P – Clear chart, identifies those directly paid under the grant and others who may support the team.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: University of Connecticut

DATE: 3/23/25

EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

4. Litigation
<ul style="list-style-type: none"> Included.
5. Financial Viability
<ul style="list-style-type: none"> Included.

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> P – While perhaps a minor detail, appreciate the italicized portion that notes the utilization of team approach inclusive of the roles previously articulated. P – Excellent narrative that anchors various stages / steps clearly (bold font) in a step-wise fashion that “makes sense.” Well-articulated understanding of the multiple factors (policies, financing, resources, etc.) that influence services and partnerships necessary under the Agreement. P – References RBA as a framework, and other crucial elements such as plain language, minimum data set, as well as pinpoints elements such as the Assessment Methodology plan that highlights understanding of Agreement.
<ul style="list-style-type: none"> P – Appreciate the grounding in a relationship-drive approach. Well-articulated section.
<ul style="list-style-type: none"> P – Clear, articulate, and acknowledge copy of counsel.
<ul style="list-style-type: none"> P – Similarly clear and articulate. Even minor detail (recognition of TA/non-compliance) acknowledges understanding of Agreement.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> P – Very much appreciate elements of the Minimum Data Analysis as well as iterative nature that is both understood and articulated specific to incorporating changes in approach.
<ul style="list-style-type: none"> P – Very much appreciate that there is a range of approaches for engagement, various tools cited, and just an overall approach articulated that provides both structure and flexibility.
<ul style="list-style-type: none"> P – All around excellent response.
C. Additional Requirements
<ul style="list-style-type: none"> P – Goes beyond the minimum, and namely by providing detail re: how lack of clarity or alignment will be highlighted.
<ul style="list-style-type: none"> General acknowledgment of requirements.

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EVALUATOR NAME: McAuley

EVALUATOR DEPARTMENT: Maine DHHS / OBH

<ul style="list-style-type: none"> • P – Response shows depth of understanding of Agreement, and upholding the principles of the Agreement. And – depth of approach that is grounded in a multi-factor rather than singular response.
<ul style="list-style-type: none"> • P – Well-articulated response.
D. Budget
<ul style="list-style-type: none"> • Acknowledge expectations.
E. Reports
<ul style="list-style-type: none"> • Well-articulated response, respectful of details under the Agreement include relationship between Parties.
<ul style="list-style-type: none"> • P – Same, again appreciate the detail, especially regarding recommendations for facilitating and / or sustaining compliance.
<ul style="list-style-type: none"> • P – Well-articulated, and again, even in relatively nuanced and minor details that demonstrate understanding of Agreement (i.e., not implement feedback).
F. Experience and Qualifications
<ul style="list-style-type: none"> • P – Depth to the response that is excellent. It is articulated, detailed, and aligned with both the RFP and Agreement.
G. Technical Assistance
<ul style="list-style-type: none"> • P – Overall excellent response. Identify that lead will provide TA, demonstrate understanding of specific timelines of Single Assessment, and overall timelines.
H. Confidentiality Requirements
<ul style="list-style-type: none"> • All elements acknowledged and appropriately addressed.
I. Reports
<ul style="list-style-type: none"> • Relatively brief compared to other portions of the proposal. • P – Highlight use of Microsoft Suite.
2. Staffing
<ul style="list-style-type: none"> • P – Appropriately and adequately addressed.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • P/N – Comprehensive in terms of timeline, though individual tasks would have benefitted from being more detailed.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: University of Connecticut
DATE: 23MAR2025
EVALUATOR NAME: Sara Olsen
EVALUATOR DEPARTMENT: DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – Demonstrated 8 years of expertise and experience related to the provision of home and Community-Based Services for Children with Behavioral Health Disabilities, specifically, administration, funding, and delivery of services. Demonstrated 8 years of program evaluation of Community-Based Services for Children with Behavioral Health Disabilities
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – consultation experience directly related to RFP work;• P – experience in state administration of children’s bh services;• P – EPSDT experience;• N – primary experiences in consulting or TA roles;• N – experience examples very MA or institution focused;• P – mentions experience that supports IR neutrality;• P – experience with families and providers;• P – in-home therapy service experience;• P – problem solving examples;• N – no clear mediation or conflict resolution examples;• N – project examples include a lot of contracted work yet to be completed
2. Subcontractors
<ul style="list-style-type: none">• Q – was subcontractor experience used in the organization overview?;• P – experience administering services at state level;• P – contract work related to provision of hcbs for children with bh disabilities
3. Project Team Organizational Chart
<ul style="list-style-type: none">• P
4. Litigation
<ul style="list-style-type: none">• P – several but all appear at University level
5. Financial Viability
<ul style="list-style-type: none">• N – provided 2023 annual report twice; no 2024 annual report
Part IV, Section III. Proposed Services
1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: University of Connecticut
DATE: 23MAR2025
EVALUATOR NAME: Olsen
EVALUATOR DEPARTMENT: DOJ

Part II
A. Independent Reviewer's Role and Authority
<ul style="list-style-type: none"> • P/N – gather information from stakeholders before completing methodology; • P – understands compliance will be whole state effort; • P – provides framework for assessing compliance • N – does not really address conflict between Parties
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • Q – if terms of the SA are not understood, were questions submitted before RFP response was due?; • N – no clear differentiation between state required metrics/benchmarks and those to be used by IR • P – lists possible data collection tools
C. Additional Requirements
<ul style="list-style-type: none"> • P – understands developing training for adult learners uses different educational theories; • P – measure impact of training • P – semi-structured approach with obvious background in qualitative data collection best practices
D. Budget
<ul style="list-style-type: none"> • P
E. Reports
<ul style="list-style-type: none"> • N – final report required 9 months out but they affirm development 7.5 months out • P – written explanation of feedback not incorporated • N – only contemplates ad-hoc reports as additions to Methodology Plan and not separate TA
F. Experience and Qualifications
<ul style="list-style-type: none"> • N – experience in only one state with similar population size and rural areas as ME
G. Technical Assistance
<ul style="list-style-type: none"> • P – bidder houses National Technical Assistance Network for Children's Behavioral Health; • P – operated SAMHSA's National Training and Technical Assistance Center for Child, Youth, and Family Mental Health (NTTAC)
H. Confidentiality Requirements
<ul style="list-style-type: none"> • P – policies and training in place regarding PII, PHI, and confidential info
I. Reports

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: University of Connecticut

DATE: 23MAR2025

EVALUATOR NAME: Olsen

EVALUATOR DEPARTMENT: DOJ

<ul style="list-style-type: none">• P
2. Staffing
<ul style="list-style-type: none">• P – detailed job descriptions that include responsibilities, duties, and qualifications• Q – do the staffing hours appropriately line up with the work plan / Gantt chart? What is the level of effort of other Institute Staff as included in the org chart and throughout the RFP response?
3. Implementation - Work Plan
<ul style="list-style-type: none">• P

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: University of Connecticut
DATE: 3/31/25
EVALUATOR NAME: Nonny Onyekweli George
EVALUATOR DEPARTMENT: US DOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• Y• 8 YEARS- Children’s behavioral; health and children involved with public child- and family serving systems• Rural area- eastern shore
Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P: Experience with settlement agreements w/r/t Olmstead and epsdt violations• P: experience with children with ASD focused on improving the service delivery system• P: developed rates for HCBS• P: identified potential problems- lack of transportation p. 6• P: homework- Maine pediatric and behavioral health partnership program• P: evidence of strong relationships with advocacy groups and impacted individuals• P: emphasized the importance of active involvement of families p. 8• P: experience transitioning people from congregate settings to community based settings- Bradly hospital in Rhode Island- p. 10
2. Subcontractors
<ul style="list-style-type: none">• P: provided- English experience with providers
3. Project Team Organizational Chart
<ul style="list-style-type: none">• P: additional staff not supported by the funding
4. Litigation
<ul style="list-style-type: none">• Q: litigation all of UConn is facing
5. Financial Viability
<ul style="list-style-type: none">• N: appears to covered the entire university
Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none">• P: understanding of relevant documents

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: US DOJ

<ul style="list-style-type: none"> • P: Results-based accountability process p. 4
<ul style="list-style-type: none"> • P: effective communicators
<ul style="list-style-type: none"> • P: relationship-focused approach to solving issues
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P: minimum data analysis; mixed method analysis
<ul style="list-style-type: none"> • Q: transformational change; "if anyone is better off"
<ul style="list-style-type: none"> • P: ad hoc reports- sufficient
<ul style="list-style-type: none"> • P: digging into the single assessment
<ul style="list-style-type: none"> • P: Acknowledge difficulties state will experience p. 11
<ul style="list-style-type: none"> • P: data requests will be tracked and requested with specific detail
C. Additional Requirements
<ul style="list-style-type: none"> • N: pulled out policy statements from SA and noted possible background information that might be requested p. 13
D. Budget
<ul style="list-style-type: none"> • P: sufficient and discusses how conversations about potential renewal will start prior actual date of renewal p. 15
E. Reports
<ul style="list-style-type: none"> • P: sufficient; recognizes preparing a final report will take substantial time p. 15
<ul style="list-style-type: none"> • P: explanation of feedback not implemented and why
F. Experience and Qualifications
<ul style="list-style-type: none"> • P: identifies all the pertinent experience the lead has
G. Technical Assistance
<ul style="list-style-type: none"> • P: substantial experience providing TA
H. Confidentiality Requirements
<ul style="list-style-type: none"> • P: sufficient
I. Reports
<ul style="list-style-type: none"> • P: sufficient
2. Staffing
<ul style="list-style-type: none"> • P: staff has substantial experience
<ul style="list-style-type: none"> • Q: Principal investigator will give .05- a great deal of responsibilities for
3. Implementation - Work Plan
<ul style="list-style-type: none"> • P: very detailed GANTT
<ul style="list-style-type: none"> • Q: to what extent is this tied to SA benchmarks

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024
RFP TITLE: Independent Reviewer
BIDDER NAME: University of Connecticut
DATE: 3/20/25, 3/31/25
EVALUATOR NAME: Victoria Thomas
EVALUATOR DEPARTMENT: USDOJ

Individual Evaluator Comments:

Part I. Preliminary Information
Part IV. Section I. Eligibility Requirements
<ul style="list-style-type: none">• P – clearly demonstrated experience with children’s behavioral health service provision• P – clearly demonstrated the 8 years of experience in relevant services.• P – clearly demonstrated the rural experience• P – clearly demonstrated extensive experience in Medicaid children’s behavioral health services, child welfare, specific relevant service models.

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – worked in 18 states on children’s behavioral health services• P – specifically worked as Principal Investigator/Project Dir to develop services so children with complex beh health needs could live at home instead of out of home placements. Experience working on implementation of settlement agreements related to ADA/Olmstead• P – lead individual has experience working on children’s beh health issues in Massachusetts, and juvenile justice services. Experience with community-based services for children with co-occurring autism and beh health disabilities. Experience working on workforce development approaches grounded in implementation science• P – additional team members with relevant experience and skills such as technical assistance, social science, and stakeholder engagement• P - Clear writing, discussion of Medicaid and EPSDT is confident and easy to follow. Discussion demonstrates in depth expertise in relevant arena. References identifying barriers and solutions, including addressing barriers specific to rural areas such as transportation. Reference to youth peers.• P – demonstrated experience and value around incorporating children and families into decision making• P – lead individual has conflict resolution experience – cites specific example of addressing emergency room boarding during Covid (high stress, high stakes, helpful example)• P – noted that resource allocation, adhering to timelines, determining root causes before rushing to solutions all will come up. Cited relevant experience navigating these issues.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

RFP TITLE: Independent Reviewer

BIDDER NAME: University of Connecticut

DATE: 3/20/25, 3/31/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – note implementation science background and prioritizing relationships with the Parties • Q – Project One is a settlement that just started • P – Project Two is relevant and helpful
2. Subcontractors
<ul style="list-style-type: none"> • Lead reviewer would be a subcontractor • No other subcontractors planned
3. Project Team Organizational Chart
<ul style="list-style-type: none"> • 6 total people, plus additional people as needed drawn from organization’s pool
4. Litigation
<ul style="list-style-type: none"> • Neutral - List of litigation against larger parent organization.
5. Financial Viability
<ul style="list-style-type: none"> • Appears that liabilities exceed revenues but there are factors suggesting this may not mean it is not financially viable

Part IV, Section III. Proposed Services
1. Services to be Provided
Part II
A. Independent Reviewer’s Role and Authority
<ul style="list-style-type: none"> • P – clear and specific plans, including starting with an in person meeting. Relationship building with each party. • P – focus on children being able to remain in and return to family homes • P – focus on ensuring children are actually better off • P – focus on the state being supported to achieve outcomes • P – focus on lasting change after agreement ends
<ul style="list-style-type: none"> • P – they focus on implementation science to identify what is behind challenges. • Q – their goal is to come up with realistic solutions that all parties are amenable to – but part of this question assumes there will be disagreement sometimes.
<ul style="list-style-type: none"> • Neutral – acknowledged the question
<ul style="list-style-type: none"> • P – acknowledges key parts of agreement and role of technical assistance – that state need not implement but that will be considered as a factor in whether or not there is noncompliance.
B. Assessment Methodology Plan
<ul style="list-style-type: none"> • P – clearly familiar with agreement. Noted process and quality measures as well as outcome measures, that would be part of data gathering
<ul style="list-style-type: none"> • Neutral – acknowledges that questions will arise and they will create a realistic plan to respond.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202502024

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DATE: 3/20/25, 3/31/25

EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none"> • P – discussion of specific review tools • P – clearly familiar with agreement; discuss how Single Assessments will provide important information to think through next steps • P – acknowledge that the rollout of services will improve with time and that the Independent Reviewer would play a role to help improve’
<ul style="list-style-type: none"> • P – demonstrates that they have thought through how data pulling and confidentiality will work together and the necessary steps to ensure confidentiality
<p>C. Additional Requirements</p>
<ul style="list-style-type: none"> • P – noted that they will identify contradictory or duplicative plans, hold a high standard for the plan
<ul style="list-style-type: none"> • P – will review workforce plans over time to build on knowledge
<ul style="list-style-type: none"> • I – will ask for presentations on training and curricula • P – specific lenses for the review (systems of care, etc.)
<ul style="list-style-type: none"> • P – values orientation. Pulled out relevant goals/high level requirements of agreement.
<ul style="list-style-type: none"> • P – specific trauma informed guidelines to be applied. • I – mentions possibility of recording interviews • P – listen first and ask questions later interview technique
<p>D. Budget</p>
<ul style="list-style-type: none"> • acknowledged
<p>E. Reports</p>
<ul style="list-style-type: none"> • P – will share framework for report early to incorporate early feedback from parties
<ul style="list-style-type: none"> • I – if first report is amended, dates will shift
<ul style="list-style-type: none"> • P – will provide response if not incorporating feedback to give parties time to provide additional clarification
<ul style="list-style-type: none"> • P – acknowledges collaborative nature of ad hoc reporting and potential need for such reporting
<p>F. Experience and Qualifications</p>
<ul style="list-style-type: none"> • P – relevant credentials
<ul style="list-style-type: none"> • P – relevant experience in all areas, including implementation science Nice graphic
<p>G. Technical Assistance</p>
<ul style="list-style-type: none"> • P – incorporates timeframes and the ability to do ongoing technical assistance if needed. Will use implementation science framework to determine what barriers impact children’s ability to live and receive services at home

**STATE OF MAINE
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EVALUATOR NAME: Victoria Thomas

EVALUATOR DEPARTMENT: USDOJ

<ul style="list-style-type: none">• P – discusses experience providing technical assistance in this area, and track record of success
H. Confidentiality Requirements
<ul style="list-style-type: none">• P – has experience with HIPAA and policies, training, etc.
I. Reports
<ul style="list-style-type: none">• P – workplan will address reports
2. Staffing
<ul style="list-style-type: none">• P – highly relevant background and experience in all areas• P – detailed and relevant• P – research scientist• Q – who will do the grunt work?
3. Implementation - Work Plan
<ul style="list-style-type: none">• P – detailed graph with relevant parts



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202502024
Independent Reviewer

I, Dean Bugaj, 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.

Signature

A handwritten signature in blue ink, appearing to read "D. Bugaj".

Date

3/18/25



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

**Janet T. Mills
Governor**

**Sara Gagné-Holmes
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202502024
Independent Reviewer**

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

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Signed by:

6844FB4A678D481...
Signature

Mar-18-2025
Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202502024
Independent Reviewer

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

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Signed by:

Kristen McAuley

C31C6425B28040B...

Signature

Mar-18-2025

Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202502024
Independent Reviewer

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

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SARA OLSEN

Digitally signed by SARA OLSEN
Date: 2025.03.18 15:49:34
-04'00'

Signature

18 March 2026

Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202502024
Independent Reviewer

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

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N. Onyekweli George

Signature

3/18/2025

Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Sara Gagné-Holmes
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202502024
Independent Reviewer

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

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Victoria Thomas

Signature

3/18/25

Date