

State of Maine
Master Score Sheet

RFP# 202409171					
ME DAFS IV&V Constituent Portal Implementation					
Bidder Name:		Berry Dunn	Gartner Consulting	Mathtech	Public Consulting Group LLC
Proposed Cost:		\$539,040.00	\$1,606,838.00	\$375,000.00	902,149.00
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	25	23	23	23	23
Section III: Proposed Services	50	45	45	45	45
Section IV: Cost Proposal	25	17.39	5.83	25	10.39
TOTAL	<u>100</u>	<u>85.39</u>	<u>73.83</u>	<u>93</u>	<u>78.39</u>
Bidder Name:		Segal	Assure IT		
Proposed Cost:		\$826,410.00	\$3,799,255.00		
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Fail		
Section II: Organization Qualifications and Experience	25	18			
Section III: Proposed Services	50	40			
Section IV: Cost Proposal	25	11.34			
TOTAL	<u>100</u>	<u>69.34</u>	<u>N/A</u>		

Award Justification Statement
RFP# 202409171 – ME DAFS IV&V Constituent Portal Implementation

I. Summary

Provide IV&V Services at planned milestones throughout the eighteen (18) month Constituent Portal implementation period, and six-(6) month post-implementation adaptation period, to ensure that the selected vendor is meeting planned expectations. The Project assessment must include input from the Constituent Portal Project Staff, SOM Project Staff, Implementation Vendor Staff, and other stakeholders. The awarded Bidder is expected to meet with the Constituent Portal Project Team, MaineIT, PMO and Vendor Management teams to understand how the Constituent Portal Project is to be managed in the areas of cost, schedule, scope, risks/issues, project quality, stakeholder satisfaction and engagement, project management, stakeholder engagement and develop and assessment methodology reviewing those areas of the project.

II. Evaluation Process

The evaluation team included the following Project Management Office members and their related qualifications and expertise:

- **Jennifer L Lane**, RFP Coordinator and the Sr Project Manager for the Constituent Portal Implementation Project: Jennifer brings the inside knowledge of the Constituent Portal Implementation project scope and the potential challenges the IV&V services may have when providing the requested services.
- **Ryan Newman**, Project Analyst: Ryan brings expertise in RFP evaluation and contract negotiations. Ryan has previously assisted the PMO Office to ensure the RFP process is followed and correct documentation is provided.
- **Torrey Morrow**, Transformation Manager: Torrey will oversee these services once a contract has been signed. Torrey has 4+ years' experience in managing IV&V services for the SOM Project Management Office.

The Evaluation team was provided with the first three files and asked to individually review them and to document their notes. Once the team completed their individual reviews, the team met as a group over two meetings to evaluate and score each proposal.

- **File 1** – No scoring, eligibility requirements. The team reviewed the submitted materials and verified if the eligibility requirements were met. =
- **File 2** – (Qualifications and Experience) Up to 25 points could be awarded. The team used a consensus approach to evaluate and score this section.
- **File 3** – (Proposed Services) Up to 50 points could be awarded. The team used a consensus approach to evaluate and score this section.

- **File 4 – (Cost Proposal)** Up to 25 points could be awarded. The team used a mathematical formula to score this section.

III. Qualifications & Experience

Mathtech has over 50 years of experience and has a proven track record providing IV&V services to the State of Maine FAST Project.

IV. Proposed Services

Mathtech articulated a well thought out, detailed, and clear approach, methodology, staffing plan, and understanding of deliverables specified in the RFP.

V. Cost Proposal

The highest proposed cost was \$1,606,838.00. The lowest proposed cost was \$375,000.00. Mathtech's proposed cost was \$375,000.00.

VI. Conclusion

Through the evaluation process, Mathtech was determined as the conditionally awarded bidder who will provide best value to the State of Maine.



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES**

**Janet T. Mills
Governor**

**Kirsten Figueroa
Commissioner**

AWARD NOTIFICATION LETTER

11/01/2024

Berry, Dunn, McNeil & Parker, LLC
Charlie Leadbetter, Principal
2211 Congress Street
Portland, Maine 04102
Cleadbetter@berrydunn.com

SUBJECT: Notice of Conditional Contract Award under RFP # 202409171, Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation

Dear Charlie:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation. 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:

- Mathtech, Inc

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

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

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

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

Sincerely,

Signed by:

DEF789999F89AF1
Jennifer L Lane
Sr Project Manager, SOM Project Management Office
Jennifer.l.lane@maine.gov

STATEMENT OF APPEAL RIGHTS

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



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AWARD NOTIFICATION LETTER

11/01/2024

Gartner, Inc.
Maydad Cohen, Senior Managing Partner, Gartner Consulting
5 State Street, Suite 2510
Boston, MA 02109
Maydad.Cohen@gartner.com

SUBJECT: Notice of Conditional Contract Award under RFP # 202409171, Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation

Dear Maydad:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation. 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:

Jennifer Lane

9EF70999F804F1...

Jennifer L Lane

Sr Project Manager, SOM Project Management Office

Jennifer.l.lane@maine.gov

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AWARD NOTIFICATION LETTER

11/01/2024

Mathtech, Inc.
Brooke Warden, Project and Proposal Coordinator
One AAA Drive, Suite 102
Hamilton, NJ 08691
bwarden@mathtechinc.com

SUBJECT: Notice of Conditional Contract Award under RFP # 202409171, Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation

Dear Brooke:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation. 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:

9EF70999F804F1...
Jennifer L Lane
Sr Project Manager, SOM Project Management Office
Jennifer.l.lane@maine.gov

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AWARD NOTIFICATION LETTER

11/01/2024

Public Consulting Group LLC
Sylvia Mitchem, Director
148 State Street, 10th Floor
Boston, Massachusetts 02109
services@pcgus.com

SUBJECT: Notice of Conditional Contract Award under RFP # 202409171, Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation

Dear Sylvia:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation. 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:
Jennifer Lane
9EF70999F84F1...

Jennifer L Lane
Sr Project Manager, SOM Project Management Office
Jennifer.l.lane@maine.gov

STATEMENT OF APPEAL RIGHTS

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AWARD NOTIFICATION LETTER

11/01/2024

Segal (Eastern States), Inc.
Jeff Mills, Vice President and Practice Leader
101 North Wacker Street, Suite 500
Chicago, IL 60606
jsmills@segalco.com

SUBJECT: Notice of Conditional Contract Award under RFP # 202409171, Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation

Dear Jeff:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation. 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:

9E776990F284F1
Jennifer L Lane
Sr Project Manager, SOM Project Management Office
Jennifer.l.lane@maine.gov

STATEMENT OF APPEAL RIGHTS

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AWARD NOTIFICATION LETTER

11/01/2024

Assure Consulting Group LLC dba Assure IT.
Prem Kumar, Co-Founder
6340 Security Blvd, Suite 100 #1109
Gwynn Oak, Maryland 21207
prem@assureconsultinggroup.com

SUBJECT: Notice of Conditional Contract Award under RFP # 202409171, Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation

Dear Prem:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Internal Verification and Validation Services for The State of Maine Constituent Portal Implementation. 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:

9EF70999F884F1...
Jennifer L Lane
Sr Project Manager, SOM Project Management Office
Jennifer.l.lane@maine.gov

STATEMENT OF APPEAL RIGHTS

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: BerryDunn

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

SUMMARY PAGE

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23
Section III. Proposed Services	50	45
Section IV. Cost Proposal	25	17.39
<u>Total Points</u>	<u>100</u>	<u>85.39</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: BerryDunn

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Pass

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: BerryDunn

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23

Evaluation Team Comments:

- I. Overview of the Organization
 - Heavy involvement in State government including SOM
 - Doing IV&V for PMO project (CCMS) for a salesforce platform
 - Portal experience with Kentucky Tax system
- II. Subcontractors
 - John Snowden from JCS Consulting
 - Staff augmentation
- III. Organizational Chart
 - Core team of 5, detailed experience and resumes provided
 - Former SOM employee
- IV. Litigation
 - 2 cases unrelated to consulting services
- V. Financial Viability
 - Included as requested, Dun and Bradstreet
- VI. Licensure/Certification**
 - Included
- VII. Certificate of Insurances
 - Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: BerryDunn

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u> e	<u>Points Awarded</u> d
Section III. Proposed Services	50	45

Evaluation Team Comments:

A. Services Required

- Clear understanding of the constituent portal implementation project
- Uses analytical simulations and frameworks to inform their fact based observations and conclusions

B. Deliverables

- **IV&V Management Plan**
 1. Iterative IV&V comprised in 5 phases: prepare, collect, analyze, diagnose, and report
 2. Complete traceability of the work from collection and analysis to reporting and findings.
 3. Provided timeline uses milestones developed by using past experience with similar projects
- **Document Reviews and Feedback**
 1. Understands documents will be reviewed by the State of Maine
- **Quarterly Updates and Reports**
 1. Well capture in proposal
- **Risk and Issue Logs**
 1. Mitigation and resolution analysis
 2. Root cause analysis
 3. Proactive Risk management
- **Reports**
 1. Well capture in proposal

C. Staffing Requirements

- Will work with MainIT project team to identify and communicate resource requirements within the state team.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: BerryDunn

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

EVALUATION OF SECTION IV

Cost Proposal

Lowest Submitted Cost Proposal	x	Cost Proposal Being Scored	x	Score Weight	=	Score
\$375,000.00	x	\$539,040.00	x	25 points	=	17.39

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Gartner Consulting

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

SUMMARY PAGE

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
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<u>Total Points</u>	<u>100</u>	<u>73.83</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Gartner Consulting

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Pass

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

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BIDDER: Gartner Consulting

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23

Evaluation Team Comments:

- I. Overview of the Organization
 - Value focused approach
 - Demonstrated extensive experience with submitted project references and examples.
 - Portal experience with Maui Project
 - Last 5 years, they performed over 350 PMQA engagements, 216 being public sector
 - 25 year experience doing IV&V
 - Existing relationship with current Implementation vendor.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Core team of 3, SME's used for quarterly reports
 - Included org chart with roles, responsibilities and resumes
- IV. Litigation
 - None
- V. Financial Viability
 - Provided Duns and Bradstreet
- VI. Licensure/Certification**
 - Provided
- VII. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Gartner Consulting

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	45

Evaluation Team Comments:

- A. Services Required
 - Demonstrated imbedded support.
 - 3 phase approach: initiation and planning, monitoring and reporting, and post implementation adaptation.
- B. Deliverables
 - IV&V Management Plan
 - Mention use of ad hoc analysis during critical junctions during the project.
 - Project health dashboards
 - Document Reviews and Feedback
 - Understood the requirements.
 - Quarterly Updates and Reports
 - Milestones reports within 30 day of milestone completion.
 - Quarterly reports
 - 10 group interviews to feed each quarterly report
 - Risk and Issue Logs
 - Ongoing monitoring of project performance
 - Reports
 - Included base line assessment report example
- B. Staffing Requirements
 - 3 core team members with access to 4 additional SMEs

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Gartner Consulting

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$375,000.00	,	\$1,606,838.00	x	25 points	=	5.83

Evaluation Team Comments:

STATE OF MAINE

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Mathtech

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

SUMMARY PAGE

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
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STATE OF MAINE

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Mathtech

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Pass

STATE OF MAINE

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Mathtech

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23

Evaluation Team Comments:

- I. Overview of the Organization
 - Over 50 year experience
 - Current IV&V vendor for SOM MRS project
 - Shows experience with IV&V for Portal related projects show in project references
- II. Subcontractors
 - None
- III. Organizational Chart
 - IV&V lead and manager were both on the MRS IV&V effort.
 - Core team of 3
- IV. Litigation
 - None
- V. Financial Viability
 - Included dun and bradstreet
- VI. Licensure/Certification**
 - Included
- VII. Certificate of Insurances
 - Included

STATE OF MAINE

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Mathtech

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	45

Evaluation Team Comments:

A. Services Required

- Detailed comprehensive and clearly understood scope of work to be provided.
- IV&V approach is proactive
- Additional monthly milestone reports with retrospective feedback

B. Deliverables

- **IV&V Management Plan**
 1. Milestone reports to continue throughout post implementation support period.
 2. Detailed description of project success approach.
 3. Acknowledged ongoing monitoring to be completed on a rolling basis.
- **Document Reviews and Feedback**
 1. Will meet to review comments and feedback
 2. Acknowledges face to face meeting are more efficient
- **Quarterly Updates and Reports**
 1. Results of data gathering will lead to reports to make recommendation and/or findings
- **Risk and Issue Logs**
 1. Proactive risk management.
 2. Uses risk framework that is consistent with CMMI
- **Reports**
 1. Clearly understand reporting requirements

C. Staffing Requirements

- Champions an approach to support diverse learning styles

STATE OF MAINE

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Mathtech

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$375,000.00		\$375,000.00	x	25 points	=	25

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Public Consulting Group

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

SUMMARY PAGE

BIDDER: Public Consulting Group

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23
Section III. Proposed Services	50	45
Section IV. Cost Proposal	25	10.39
<u>Total Points</u>	<u>100</u>	<u>78.39</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Public Consulting Group

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Pass

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Public Consulting Group

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23

Evaluation Team Comments:

- I. Overview of the Organization
 - 25 year experience across 50 states and DC
 - SOM IV&V experience with DHHS
 - 2 of 3 reference project were Portal IV&V related
- II. Subcontractors
 - None
- III. Organizational Chart
 - Core team of 4, provided resumes
- IV. Litigation
 - None that would affect performance of this project
- V. Financial Viability
 - Provided Dun and Bradstreet
- VI. Licensure/Certification
 - Included
- VII. Certificate of Insurances
 - Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Public Consulting Group

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	45

Evaluation Team Comments:

A. Services Required

- *Uses in house Framework (Eclipse). Mix of popular methodologies.*
- *They understand that every project is unique.*
- *Services required provided though a crosswalk*

B. Deliverables

- **IV&V Management Plan**
 1. Very detailed plan and Gantt chart provided.
- **Document Reviews and Feedback**
 1. Provides targeted feedback.
- **Quarterly Updates and Reports**
 1. Give detailed breakdown of what are in each report including methods and approach as well as tools and standards used.
- **Risk and Issue Logs**
 1. PCG will facilitate a monthly risk identification meeting
 2. Collaborative risk management approach
- **Reports**
 1. Data driven IV&V reporting provided in a user friendly format.

C. Staffing Requirements

Organization chart will adapt to the needs of the department.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Public Consulting Group

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$375,000.00	,	\$902,149.00	x	25 points	=	10.39

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Segal

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

SUMMARY PAGE

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	18
Section III. Proposed Services	50	40
Section IV. Cost Proposal	25	11.34
<u>Total Points</u>	<u>100</u>	<u>69.34</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Segal

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Pass

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Segal

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	18

Evaluation Team Comments:

- I. Overview of the Organization
 - Performing IV&V for ~30 years. With 7 recent IV&V projects
 - Public sector experience
 - Minimal details provided for reference project. Needs further clarification on project to determine level of involvement within the project.
- II. Subcontractors
 - 1 Sub for OCM
- III. Organizational Chart
 - Core team of 6
 - Provided resumes and role details/ Responsibilities were provided in file 3
- IV. Litigation
 - 1 dismissed case. Case closed.
- V. Financial Viability
 - Included
- VI. Licensure/Certification
 - Included
- VII. Certificate of Insurances
 - Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Segal

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	40

Evaluation Team Comments:

A. Services Required

- Provided areas of expertise
- As written, it is unclear if vendor believe they would be responsible for all deliverable of the project or just the scope of the RFP.

B. Deliverables

- **IV&V Management Plan**
 1. Does not go into detail on the IV&V management plan.
- **Document Reviews and Feedback**
 1. Inadequate submission. Lacks supporting documents or examples.
- **Quarterly Updates and Reports**
 1. Basic reports covered. Provided items on reports were minimal.
- **Risk and Issue Logs**
 1. Adequate response.
- **Reports**
 1. 2 postproduction reports. Minimal details provided about the reports.

C. Staffing Requirements

Group of SME that will focus on different areas of need within the Constituent Portal project.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Segal

DATE: 10/23/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$375,000.00	,	\$826,410.00	x	25 points	=	11.34

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Assure IT

DATE: 11/01/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

SUMMARY PAGE

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		X
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	n/a
Section III. Proposed Services	50	n/a
Section IV. Cost Proposal	25	n/a
<u>Total Points</u>	<u>100</u>	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for the State of Maine Constituent Portal Implementation

BIDDER: Assure IT

DATE: 11/01/2024

Department Name: Project Management Office

Name of RFP Coordinator: Jennifer L Lane

Names of Evaluators: Jennifer L Lane, Ryan Newman and Torrey Morrow

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Fail

Organization was commercialized in 2020 per the provided Dun and Bradstreet report. RFP requires:

“Bidders must have at least five (5) years of experience providing IV&V services during the implementation of at least one (1) large governmental information technology portal for a U.S. based Public Sector (e.g., for Federal, State, or local government) government in order to be eligible to submit a bid under this RFP.”

Organization has not been in business for 5 years so they cannot have at least 5-year experience require. Age of organization confirmed via Maryland’s entity search using information provided by Dun and Bradstreet.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Berry Dunn

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1 PASS

FILE 2

I. Organization Qualifications and Experience

- Dedicated to serving State, local, and quasi-governmental agencies
- 1974 and have experienced sustained growth throughout our 50-year history
- Employs more than 900 staff members
- History of working with SOM, providing IV&V services – Both Executive Branch and Judicial Branch

II. Subcontractors

- *This project will be led by a core group of experienced BerryDunn employees. In addition to our core team, John Snowden, a trusted subcontractor, will serve as an IV&V analyst.*

III. Organizational Chart

- Core Team provided with detailed experience and resumes

IV. Litigation

- In the last five years BerryDunn, has been involved in two cases unrelated to the consulting services we offer

V. Financial Viability

- Included

VI. Licensure/Certification

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Berry Dunn

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

- Included

VII. Certificate of Insurance

- Included

FILE 3 - Proposed Services

A. Services Required

- *Clear understanding of the Constituent Portal Implementation Project*
- We utilize advanced analytical simulations and frameworks to provide a quantitative view of the impact of risks, which is the underpinning to our fact-based observations and conclusions.

B. Deliverables

- **IV&V Management Plan**
 1. Iterative approach to IV&V is comprised of five phases: Prepare, Collect, Analyze, Diagnose, and Report
 2. Complete traceability of our work from the collection and analysis of artifacts to the reporting of findings and recommendations.
- **Document Reviews and Feedback**
 1. Understands that documents will be reviewed by the State
- **Quarterly Updates and Reports**
 1. Understood updates and report requirements
- **Risk and Issue Logs**
 1. set of analysis results including a refined and verified set of risks, issues, observations, and hypotheses. BerryDunn will conduct a root cause analysis (RCA) to identify the root causes, both positive and negative, that underly the risks, issues, and observations using the hypotheses as a guide.
- **Reports**
 1. Understood updates and report requirements

C. Staffing Requirements

- Will work with MaineIT Project management teams to provide a high-level estimate of the State's and the vendor's needs through all phases of our IV&V work effort and define the roles and time commitments required of each resource

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: BerryDunn

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1

Pass

FILE 2

I. Organization Qualifications and Experience

- Doing IV&V for other PMO project (CCMS) (salesforce) platform as a service.
- Portal experience comes from Kentucky Tax system similar to the SOM's STARS program
- Other projects were case management system IV&V

II. Subcontractors

- Mentions a singular contractor as a subcontractor from JCS Consulting.
- Staff Aug style Subcontractor

III. Organizational Chart

- Core project team of 5 as per org chart
- Good mix of experience across the team
- Former PMO employee

IV. Litigation

- Nothing that would effect

V. Financial Viability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: BerryDunn

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

- Included as requested, dun and bradstreet
- VI. Licensure/Certification**
 - Team as had mix of PMP's Prosci Change management certifications.
 - Not seeing non-employee certs
- VII. Certificate of Insurance**
 - Included as asked

FILE 3 - Proposed Services

A. Services Required

- *Has an overall good understanding of what the Portal project is.*
- *5 phase approach: prepare collect analyze diagnose report*
 - *Gives key deliverables for each of their 5 phases*
- *Gives timeline breakdown for each milestone based on common project milestones from their past projects.*
- *Detailed workplan with task, cadence, and who will take part. Matching them up with deliverables*

B. Deliverables

- **IV&V Management Plan**
- **Document Reviews and Feedback**
- **Quarterly Updates and Reports**
- **Risk and Issue Logs**
- **Reports**

C. Staffing Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

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

DATE: 10/22/24

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1 – Pass

FILE 2 - Organization Qualifications and Experience

- 49-year history
- State of Maine Company
- More than 20 years' experience providing IV&V services
- State Government and Maine HHS Experience
- Hired by the Department of Health and Human Services to provide IV&V services during the configuration, development, testing, conversion, training, and implementation of the Child Care Management System (CCMS)
- Experienced in providing IV&V services for enterprise technology initiatives in the public sector
- IV&V SOM experience OIT
- Qualified Team and Subcontractors
- Core team of 5
- Provided resumes with experience and resumes
- Litigation-2 cases not related
- Financial Viability-included
- Certificate of Insurance-Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

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

DATE: 10/22/24

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

FILE 3 - Proposed Services

A. Services Required

Clear understanding of RFP and project

B. Deliverables

- IV&V Management Plan
 - **Phases:** Five distinct phases outlined
- Document Reviews and Feedback
 - Clearly detailed in the proposal
- Quarterly Updates and Reports
 - Comprehensive coverage in the proposal
- RAID Log
 - Risk assessment and mitigation strategies effectively outlined in the proposal
- Reports
 - Thoroughly addressed in the proposal

C. Staffing Requirements

The proposed team member has prior experience with various state agencies and brings a total of 15 years of combined experience in providing Independent Verification and Validation (IV&V) services specifically for the State of Maine.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner Consulting

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1 Passed

FILE 2

I. Organization Qualifications and Experience

- value-focused approach
- Goes above and beyond these formal deliverables by leveraging additional Gartner templates, tools, and frameworks that have been iteratively refined through hundreds of public sector IV&V projects,
- Past 5 years, Gartner has conducted more than 350 PMQA-relevant engagements (program monitoring, quality assurance, IV&V, quality control, program management), including 216 for public sector organizations.
- Gartner is a trusted, global brand for its independence and objectivity
- Gartner Knows Tyler Technology Implementations PG 14

II. Subcontractors

- Gartner does not intend to use a subcontractor to provide the IV&V services

III. Organizational Chart

- Included with responsibilities and qualifications

IV. Litigation

- No proceedings or litigation over the past five years has had a material adverse effect on the company's financial position or results of operations

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner Consulting

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

V. Financial Viability

- Included

VI. Licensure/Certification

- Included

VII. Certificate of Insurance

- Included

FILE 3 - Proposed Services

A. Services Required

- Gartner's IV&V approach is flexible enough to evolve, reflecting the varying needs, changing priorities, and diverse risk profiles encountered in a large-scale system modernization effort led by Tyler Maine
- Gartner will lead all project monitoring and quality assurance activities, including oversight and active risk management throughout Constituent Portal's Software Development Lifecycle (SDLC).

B. Deliverables

• **IV&V Management Plan**

1. recognize that large, complex projects like the Constituent Portal will require ad hoc analyses during critical junctures on the project.
2. Project Health Dashboards
3. Implementation of Work Plan and Estimated Project Schedule

• **Document Reviews and Feedback**

1. Produce Process and Document Reviews & Feedback
2. 10-day turnaround time

• **Quarterly Updates and Reports**

1. Milestone Reports (4; pending confirmation of milestones) ♣
Quarterly Reports (6)
2. 0 group interviews during Phase 1: Initiation and Planning, and 10 group interviews for each Quarterly Report during Phase 2: Monitoring and Reporting.

• **Risk and Issue Logs**

1. *perform ongoing monitoring of project progress and identification of risks and issues*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner Consulting

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

*2. Risks and issues identified by the IV&V team will be
collected from project management activities*

- **Reports**

- 1. Included Baseline Assessment Report Example*

C. Staffing Requirements

- 3 core team members and 4 additional SMEs

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner Consulting

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1

Pass

FILE 2

- I. Organization Qualifications and Experience**
 - The ERP Modernization sounds like PM and IV&V together
 - Portal experience with Maui project for automated licenses
 - List a few other consulting projects related to portals, but appear not be IV&V related. Shows they have experience on the other side.
- II. Subcontractors**
 - None
- III. Organizational Chart**
 - Core team of 3 with several SMEs only for quarterly milestone reports per the org chart
 - Gives roles, responsibilities, and resumes
 -
- IV. Litigation**
 - None
- V. Financial Viability**
 - Provided duns and bradshreet
- VI. Licensure/Certification**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner Consulting

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

- VII. **Certificate of Insurance**
- Several security certifications.
 - Provided

FILE 3 - Proposed Services

A. Services Required

- *3 phase system, Initiation and planning, Monitoring and reporting, and post implementation adaption.*
- *Phases really break down to one core phase with the others being the first month, then postproduction. Phase 2 is 18 of 24ish months*
-

B. Deliverables

- **IV&V Management Plan**
 1. Delivered within 30 days of contract signing, shows an image of a plan, but cant see whole document.
- **Document Reviews and Feedback**
- **Quarterly Updates and Reports**
 1. Milestone reports with 30 days of completion of milestone
 2. Goes into detail on what is included in quarterly report
- **Risk and Issue Logs**
 1. Identify risk on the base level but will also give risk summarization of executive dashboard
 2. Shows example of Risk dashboard
 3. Talks about risk and critical decision escalation
 - a. Including on the governance level
- **Reports**
 1. Show a lot of dashboard examples as well Is different ad hoc analyses.

Gives detailed and comprehensive breakdown of each phase and all actives and objectives that they have, including what Is expected from the state, deliverables for the phase and timeframe.

Provides workplan and estimated schedule graphic that give a good summery of the phase breakdown and when different reviews and reports happen.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner Consulting

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

C. Staffing Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner

DATE: 10/22/24

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1 – Pass meets minimum

FILE 2 - Organization Qualifications and Experience

- Over 25 years of experience providing IV&V services to public sector organizations across North America
- Portal experience with another project
- In the last five (5) years, Gartner conducted over 350 IV&V engagements
- Leverage Gartner's tools and frameworks
- Relationship with Tyler Technologies(implementation vendor)
- Org charts-core team of 3 with qualifications
- Litigations-none
- Financial provided
- Certificate of insurance-included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Gartner

DATE: 10/22/24

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

FILE 3 - Proposed Services

A. Services Required

- The IV&V process is organized into three distinct phases
- The proposal clearly outlines the project phases, major tasks, subtasks, risk mitigation strategies, and methods for delivering IV&V services
- The approach is adaptable and flexible
- The project consists of three phases

B. Deliverables

- IV&V Management Plan
 - Ad-hoc support as needed
- Document Reviews and Feedback
 - All elements are thoroughly detailed in the proposal
- Quarterly Updates and Reports
 - Detailed in the proposal
- RAID Log
 - Risk mitigation strategies and methods are well defined in the proposal
- Reports
 - Clearly outlined in the proposal

C. Staffing Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Mathtech

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

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

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FILE 1 PASS

FILE 2

I. Organization Qualifications and Experience

- Over 50 years' experience serving the federal, state and local government
- comprised of senior-level professionals with significant experience helping state agencies plan, prepare for, and manage successful projects.
- Provided IV&V and project oversight services for public sector modernization projects for nearly twenty years

II. Subcontractors

- Mathtech does not intend to use subcontractors for this project at this time

III. Organizational Chart

- IV&V Lead & Manager – experience included Maine FAST IV&V

IV. Litigation

- Mathtech is not involved in any ongoing litigation and has not been subject to any litigation in the past

V. Financial Viability

- Included

VI. Licensure/Certification

- Our lead IV&V team members both hold active PMP certifications from the Project Management Institute.

VII. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Mathtech

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

- **Included**

FILE 3 - Proposed Services

A. Services Required

- *Detailed, comprehensive and clearly understood scope of work to be provided*
- propose monthly Milestone Update Reports that include the results from our Process and Document Review and Feedback.

B. Deliverables

- **IV&V Management Plan**
 1. Post-Implementation Support period, Mathtech will continue to provide Monthly Milestone Reports
 2. Project Success = Business Needs Met (PG 6)
 3. Provided
 4. Initial IV&V Plan development, which will be completed during December 2024, and ongoing monitoring, which will be completed on a rolling basis according to a timeline agreed to with the State. – Detailed Gantt Chart provided
- **Document Reviews and Feedback**
 1. client Review Team and the Deliverable teams meet face-to-face to review comments and feedback on the deliverable – our experience shows that face-to-face meetings result in shorter times to finalize deliverables.
- **Quarterly Updates and Reports**
 1. The results of subsequent process and document reviews will be reflected in our quarterly report.
 2. The results of our data gathering, and assessment effort will flow into our required quarterly reports
 3. quarterly report with required elements, including findings and recommendations
 4. Last Quarterly Report to coincide with the anticipated end of implementation (June 2026)
- **Risk and Issue Logs**
 1. *Proactive Risk Management*
 2. *uses a Risk Framework consistent with CMMI to structure and identify categories of risk*
 3. *Detailed RISK Management Plan*
- **Reports**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

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Constituent Portal Implementation

BIDDER NAME: Mathtech

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

1. Clearly understood Reporting requirements

C. Staffing Requirements

- Maine Revenue (FAST) experience with all proposed IV&V Staff
- Many agencies hope that staff will gain project experience and skills through participation in a large project. Mathtech is happy to support this goal through collaboration and knowledge sharing. People have many learning styles—some like to read, some like to practice, and some like to learn "on the job." It is important to work with client staff in all these ways to maximize learning.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Mathtech

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

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FILE 1

Pass

FILE 2

- I. Organization Qualifications and Experience**
 - Current IV&V vendor with the SOM with MRS doing the STARS Tax portal
 - 3 different states for projects, all IV&V. at least 2 are portals, 3rd may be as well
- II. Subcontractors**
 - None
- III. Organizational Chart**
 - Core team of 3 as per org chart. Detailed list of experience for each
- IV. Litigation**
 - None
- V. Financial Viability**
 - Included dun and bradstreet
- VI. Licensure/Certification**
 - 2 PMP's. None listed for the organization
- VII. Certificate of Insurance**
 - Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Mathtech

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

FILE 3 - Proposed Services

A. Services Required

- *Gives a light schedule at the beginning with a slightly more flesh out one on the next page.*
- *Talks about early detection of problem to minimize impact, proactive risk management*
- *Talks about vendor management philosophy*
- *IV&V approach is "Proactive."*
- *Gives risk management framework*
- *List the different tools and templates they use with brief descriptor*

B. Deliverables

- **IV&V Management Plan**

1. Breaks effort into 5 tasks, Prep, initial Assessment, deliver IV&V project plan, Ongoing data gathering and performance analysis, and ongoing milestone and quarterly reports
 - a. Provides overview and deliverables for each, no timescale listed, however it is in the workplan provided by listing days and dates within a gantt chart provided.

- **Document Reviews and Feedback**
- **Quarterly Updates and Reports**
- **Risk and Issue Logs**
- **Reports**

C. Staffing Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: MathTech, Inc.

DATE: October 22, 2024

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1 – Pass

FILE 2 - Organization Qualifications and Experience

- Over 50 years of experience
- Mathtech, Inc. is providing Independent Validation and Verification (IV&V) services for the Maine Revenue Services (MRS) as part of the ongoing implementation of the cloud-based GenTax integrated tax system developed by Fast Enterprises (FAST)
- IV&V experience with portal initiative
- Subcontractors-None
- Org Charts-IV&V Lead and Manager experience with MRS-FAST
- Litigation-None
- Financial included
- Licensure-Included
- Insurance-Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: MathTech, Inc.

DATE: October 22, 2024

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

FILE 3 - Proposed Services

A. Services Required

- Detailed work plan provided

B. Deliverables

- IV&V Management Plan
 - Clearly outlined in the proposal
- Document Reviews and Feedback
 - Thoroughly detailed in the proposal
- Quarterly Updates and Reports
 - Well-articulated in the proposal
- RAID Log
 - Risk mitigation strategies and methods comprehensively described in the proposal
- Reports
 - Clearly specified in the proposal

C. Staffing Requirements

- IV&V Lead and Manager with experience from MRS-FAST

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Public Consulting Group LLC

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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FILE 1 PASS

FILE 2

I. Organization Qualifications and Experience

- 1986 and headquartered in Boston, Massachusetts, PCG employs approximately 2,000 professionals worldwide
- The firm has extensive experience in all 50 states and the District of Columbia
- will bring DAFS a vast knowledge base of IV&V lessons learned, gained from the delivery of more than 50 large-scale IV&V projects across 25+ states, Eclipse IV&V® Framework, an integrated framework of processes, tools, templates, and best-in-class artifacts.

II. Subcontractors

- *PCG will not be using any subcontractors for this project*

III. Organizational Chart

- PM plus 3 IV&V Analyst – Org Chart and Resumes included

IV. Litigation

- There are no current or past litigation matters in which PCG has been a party that would compromise PCG's ability to perform the work described in this proposal.

V. Financial Viability

- Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Public Consulting Group LLC

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

VI. Licensure/Certification

- Included

VII. Certificate of Insurance

- Included

FILE 3 - Proposed Services

A. Services Required

- Understanding that every project is unique
- SOW Crosswalk – Services Required was provided
- Approach and Methodology - Eclipse IV&V framework to provide IV&V services on the Department's Constituent Portal.

B. Deliverables –

- **IV&V Management Plan**
 1. Very detailed plan provided, Gantt Chart provided
- **Document Reviews and Feedback**
 1. provide targeted feedback and actionable recommendations to support successful project delivery
 2. document all interactions and recommendations resulting from our participation in the planning, design, and testing work streams
- **Quarterly Updates and Reports**
 1. Acknowledged quarterly reports
- **Risk and Issue Logs**
 1. *PCG will facilitate a monthly Risk Identification Meeting*
- **Reports**
 1. *data-driven IV&V quarterly reports, which will be presented in a user-friendly format*

C. Staffing Requirements

- The organizational chart and staffing plan are updated as DAFS requires changes and approves changes

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Public Consulting Group LLC

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

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Individual Evaluator Comments:

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FILE 1

Pass

FILE 2

- I. Organization Qualifications and Experience**
 - Project one and two was a Medicaid portal IV&V
 - Project 3 is also IV&V, all three with state organizations

- II. Subcontractors**
 - None

- III. Organizational Chart**
 - Core team of 4, provided resumes. Not seeing job description for each role

- IV. Litigation**
 - None that would affect performance of this project.

- V. Financial Viability**
 - Provided Dun and Bradstreet

- VI. Licensure/Certification**
 - Provided staff certifications, no org certifications

- VII. Certificate of Insurance**
 - Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Public Consulting Group LLC

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

FILE 3 - Proposed Services

A. Services Required

- *IV&V is done in an Eclipse Framework (in house framework), mixture are many popular frameworks from groups like PMI and Prosci*
- *Breaks down services and deliverable required with acknowledgement for all and direct you to the corresponding page to find where that will be covered.*
- *Gives example IV&V assessment task table*
- *Also talks about quality assurance and OCM*
- *Talks about training and testing*

B. Deliverables

- **IV&V Management Plan**
 1. Detailed breakdown
- **Document Reviews and Feedback**
 1. Talks about communicating findings in a timely manner for quick remediation.
- **Quarterly Updates and Reports**
 1. Give detailed breakdown of what are in each report including methods and approach as well as tools and standards used.
- **Risk and Issue Logs**
 1. Collaborative risk management, shows standard risk logs used in PM
 2. Gives detailed breakdown on risk methods and approaches used.
- **Reports**
 1. List list all required reports

C. Staffing Requirements

Gives Gantt chart of the work plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Public Consulting

DATE: October 22, 2024

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

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Individual Evaluator Comments:

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FILE 1 – Pass

FILE 2 - Organization Qualifications and Experience

- 25 years of providing IV&V services
- Connection to the State of Maine.
- 27 different projects with the State of Maine, including 9 of PCG's active projects: Long Term Resource Support Services (DHHS), Chronic Disease Program Evaluation - CRC (DHHS), Alzheimer's Disease and Related Dementias (DHHS), MGADC Rockland, Fire and EMS, Evaluation of Maine Prevention Network (DHHS), Center of Excellence for Systems in Behavior Health (DHHS), HCBS Clinical Nursing and Therapy Services Rate Study (DHHS), Neurobehavioral Treatment Services (DHHS), and CDC Grant Management (DHHS).
- Reference IV&V portal related
- Subcontractors-Non
- Org Charts-
 - Core team of 4
- Provided resumes with experience and resumes
- Litigation-2 cases not related
- Financial Viability-included
- Certificate of Insurance-Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Public Consulting

DATE: October 22, 2024

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

FILE 3 - Proposed Services

A. Services Required

- The IV&V Project Manager and IV&V Analysts will utilize the Eclipse IV&V methodology, including established standards, checklists, and technical testing tools, to monitor and evaluate processes, deliverables, and work products.
- Services are designed to be flexible, scalable, and structured.

B. Deliverables

- IV&V Management Plan
Clearly outlined in the proposal
- Document Reviews and Feedback
Well captured in the proposal
- Quarterly Updates and Reports
Well captured in the proposal
- RAID Log
Risk assessment and mitigation strategies effectively outlined in the proposal
- Reports
Well captured in the proposal

C. Staffing Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Segal

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

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

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FILE 1 PASS

FILE 2

I. Organization Qualifications and Experience

- *Segal is a leading consulting firm, with more than 1,100 employees throughout the U.S. and Canada.*
- *performing IV&V services since the early 1990s*
- *relative experience to this RFP because these systems normally have two external facing portals – one for constituents / plan participants and another that is focused on the statewide employer such as local governments*
- *7 recent IV&V Projects*

II. Subcontractors

- *Mary Federico - Organizational Behavior Strategies – 12 years OCM*

III. Organizational Chart

- *Included Named Resources and Roles – Responsibilities included in File 3*

IV. Litigation

- *Once Case and was dismissed, case now closed*

V. Financial Viability

- *Included*

VI. Licensure/Certification

- *Included*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Segal

DATE: 10/21/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

VII. Certificate of Insurance

- Included

FILE 3 - Proposed Services

A. Services Required

- a) Areas of expertise and named resources, including Project Manager, Security, User experience, Testing, Training, OCM, and Technology.

B. Deliverables

a) IV&V Management Plan

b) Document Reviews and Feedback

- a. Enough meetings to ensure that the meetings are effective in achieving the goals of the project

c) Quarterly Updates and Reports

- a. monthly status reports and quarterly assessments

d) Risk and Issue Logs

- a. IV&V will maintain risk and issue logs that will contain risks and issues identified by IV&V and mitigation/correction strategies associated with each risk/issue. IV&V recommends that there be a single list of risks and issues identified by all project stakeholders

e) Reports

- a. *IV&V will deliver two quarterly assessments during the six-month post-implementation period.*
- b. *Work Plan provided – Gantt chart with proposed clear schedule.*

C. Staffing Requirements

- a) Group of subject matter experts (SMEs), each focused-on reviewing and monitoring an important aspect of the implementation of the Constituent Portal. report to a project manager

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Segal

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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FILE 1 Pass

FILE 2

I. Organization Qualifications and Experience

- Project 1 is a portal but not an IV&V. Appears to be an implementation
- Project 2 is worded as if it is an IV&V but does not outright state it
- Project 3 is IV&V but not sure if it is a portal
- No timeline is given for any of these projects

II. Subcontractors

- Uses a sub for OCM

III. Organizational Chart

- Core team of 6 per the org chart.
- Provides resumes, no job descriptions

IV. Litigation

- Won a breach of contract case

V. Financial Viability

- Provided, but only 1 page?

VI. Licensure/Certification

- PMP's, scrum masters, no org certs mentioned

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

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BIDDER NAME: Segal

DATE: 10/22/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

VII. Certificate of Insurance

- Provided

FILE 3 - Proposed Services

A. Services Required

- *Are they saying they are responsible for the whole projects' deliverable?*

B. Deliverables

- **IV&V Management Plan**

1. Does not give a lot of detail on the IV&V management plan. Lists goals, but doesn't provide a solid framework to go off of or any other supporting document, tables etc to show us what that may look like.

- **Document Reviews and Feedback**

1. Does not elaborate much on this. Wont be going to every meeting

- **Quarterly Updates and Reports**

1. List of provided items for reports is minimal. Will receive it 5 days after end of month.
2. Similar for quarterly reports

- **Risk and Issue Logs**

1. Appears to push off the tracking of risk to DAFS

- **Reports**

C. Staffing Requirements

Implementation plan provided, does not go into detail on each of the tasks shown on the Gantt chart. Full work plan revolves around the reporting cycle solely.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Segal

DATE: October 22, 2024

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

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FILE 1 – Pass

FILE 2 - Organization Qualifications and Experience

- ATC has been performing IV&V services since the early 1990s.
- Constituent member facing portal
- 7 IV&V projects
- Lack of details in projects
- Org chart
- Subcontractors-OCM
- Core team of 7
- Provided resumes with experience and resumes
 Litigation-1 cases not related
- Financial Viability-included
- Certificate of Insurance-Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Segal

DATE: October 22, 2024

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

FILE 3 - Proposed Services

A. Services Required

- Provided areas of expertise

B. Deliverables

- IV&V Management Plan
 - Expected to be provided within 3 weeks after IV&V engagement but lacks detail.
- Document Reviews and Feedback
 - Feedback is insufficient and lacks supporting samples.
- Quarterly Updates and Reports
 - Updates and reports are inadequate, not enough detail and no samples included.
- RAID Log
 - The RAID log description is minimal, and no samples are provided.
- Reports
 - Indicated that there are only 2 reports, which is insufficient, and no details are available.

C. Staffing Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Assure IT

DATE: 11/01/2024

EVALUATOR NAME: Jennifer L Lane

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1 Failed

FILE 2

- I. Organization Qualifications and Experience**
- II. Subcontractors**
- III. Organizational Chart**
- IV. Litigation**
- V. Financial Viability**
- VI. Certificate of Insurance**

FILE 3 - Proposed Services

- A. Services Required**
- B. Deliverables**
 - a) IV&V Management Plan**
 - b) Document Reviews and Feedback**
 - c) Quarterly Updates and Reports**
 - d) Risk and Issue Logs**
 - e) Reports**
- C. Staffing Requirements**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Assure IT

DATE: 11/01/2024

EVALUATOR NAME: Ryan Newman

EVALUATOR DEPARTMENT: SOM Project Management Office

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

Individual Evaluator Comments:

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

FILE 1 Fail

FILE 2

- I. **Organization Qualifications and Experience**
- II. **Subcontractors**
- III. **Organizational Chart**
- IV. **Litigation**
- V. **Financial Viability**
- VI. **Licensure/Certification**
- VII. **Certificate of Insurance**

FILE 3 - Proposed Services

- A. Services Required**
- B. Deliverables**
 - **Document Reviews and Feedback**
 - **Quarterly Updates and Reports**
 - **Risk and Issue Logs**
 - **Reports**
- C. Staffing Requirements**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409171

RFP TITLE: Internal Verification and Validation Services for The State of Maine
Constituent Portal Implementation

BIDDER NAME: Assure IT

DATE: November 1, 2024

EVALUATOR NAME: Torrey Morrow

EVALUATOR DEPARTMENT: SOM Project Management Office

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

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FILE 1 – Fail

FILE 2 - Organization Qualifications and Experience

FILE 3 - Proposed Services



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409171

RFP TITLE: Project and Organizational Change Management for Medicaid Enterprise
System Health PAS Modernization Process

Jennifer Lane

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

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

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

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

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

Signed by:

Jennifer Lane

9EF769999F884F1...

Signature

October 21, 2024

Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409171

RFP TITLE: Project and Organizational Change Management for Medicaid Enterprise
System Health PAS Modernization Process

Ryan Newman
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DocuSigned by:
Ryan Newman
BA8711179C7C47E

Signature

October 21, 2024

Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409171

RFP TITLE: Project and Organizational Change Management for Medicaid Enterprise
System Health PAS Modernization Process

I, Torrey Morrow accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial 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:
Torrey Morrow
4530E7DA3B80450
Signature

October 21, 2024
Date