

**State of Maine**  
**Master Score Sheet**

RFP# 202402038			
Fiscal Agent for Atypical Services			
Bidder Name:		HR Alliance, Inc.	SeniorsPlus
Proposed Cost:		\$175.00 per Member per Month	\$109.51 per Member per Month
Scoring Sections	Points Available		
Section I: Preliminary Information	<b>Pass/Fail</b>	Pass	Pass
Section II: Organization Qualifications and Experience	<b>30.00</b>	<b>9.00</b>	<b>25.00</b>
Section III: Proposed Services	<b>40.00</b>	<b>12.00</b>	<b>31.00</b>
Section IV: Cost Proposal			
a. Cost Proposal	25.00	15.64	25.00
b. Budget Narrative	5.00	2.00	3.00
Section IV Total	<b>30.00</b>	<b>17.64</b>	<b>28.00</b>
<b>TOTAL</b>	<b><u>100.00</u></b>	<b><u>38.64</u></b>	<b><u>84.00</u></b>

**State of Maine**  
**Department of Health and Human Services**  
*Office of Aging and Disability Services*  
**NOTICE OF INTENT TO BID FORM**  
**RFP# 202402038**  
**Fiscal Agent for Atypical Services**

<b>Bidder's Organization Name:</b>		HR Alliance, Inc.	
<b>Chief Executive - Name/Title:</b>		Wilmar Suan – President	
<b>Tel :</b>	734-513-2731	<b>E-mail:</b>	info@hragroup.com
<b>Headquarters Street Address:</b>		3290 West Big Beaver Road, Suite 510	
<b>Headquarters City/State/Zip:</b>		Troy, MI 48084	
<i>(Provide information requested below if different from above)</i>			
<b>Lead Point of Contact for Proposal - Name/Title:</b>		Jonathan Suan	
<b>Tel :</b>	734-513-2731 ext 410	<b>E-mail:</b>	<a href="mailto:jonsuan@hragroup.net">jonsuan@hragroup.net</a>
<b>Street Address:</b>		3290 West Big Beaver Road, Suite 510	
<b>City/State/Zip:</b>		Troy, MI 48084	


**Provide a brief description of the Bidder's experience and ability to perform the work required within this RFP.**

HR Alliance, Inc. is exceptionally qualified to serve as the Fiscal Agent for Atypical Services (FAAS) outlined in the Department of Health and Human Services' Request for Proposal (RFP). With over 14 years of experience in Financial Management Services (FMS), we have a proven track record of delivering comprehensive support to individuals with developmental disabilities. Our expertise extends beyond traditional financial management to address the specific challenges faced by individuals with developmental differences, particularly those residing in remote areas such as Western Michigan. We understand the complexities of rural isolation, adverse weather conditions, and limited employment opportunities, and have developed tailored solutions to bridge these gaps.

Our approach combines remote financial management services accessible from anywhere with an internet connection, personalized financial plans aimed at fostering independence, and stringent protocols to safeguard sensitive information in compliance with HIPAA requirements. This holistic approach, rooted in understanding and empathy, is further reinforced by our experience managing Therapy Research Autism Center (TRAC), where we adopt an individual-centered approach to care. With HR Alliance, Inc., Maine can be assured of our commitment to delivering high-quality

support that addresses the unique needs of older adults and adults with disabilities, promoting health, safety, and independence within the community.

**Signature of person authorized to enter into the contract with the Department:**

<b>Name (Print):</b> wilmarsUAN	<b>Title:</b> PRESIDENT
<b>Authorized Signature:</b> 	<b>Date:</b> 03/21/2024



**APPENDIX J**

**State of Maine**  
**Department of Health and Human Services**  
*Office of Aging and Disability Services*  
**NOTICE OF INTENT TO BID FORM**  
**RFP# 202402038**  
**Fiscal Agent for Atypical Services**

<b>Bidder's Organization Name:</b>		SeniorsPlus	
<b>Chief Executive - Name/Title:</b>		Betsy Sawyer-Manter/CEO	
<b>Tel :</b>	207-513-3701	<b>E-mail:</b>	Bsawyer-manter@seniorsplus.org
<b>Headquarters Street Address:</b>		8 Falcon Road	
<b>Headquarters City/State/Zip:</b>		Lewiston Maine 04240	
<i>(Provide information requested below if different from above)</i>			
<b>Lead Point of Contact for Proposal - Name/Title:</b>		Tracy Smith/LTSS Director	
<b>Tel :</b>	207-440-2316	<b>E-mail:</b>	tsmith@seniorsplus.org
<b>Street Address:</b>		8 Falcon Road	
<b>City/State/Zip:</b>		Lewiston Maine 04240	

**Provide a brief description of the Bidder's experience and ability to perform the work required within this RFP.**

SeniorsPlus is uniquely qualified to provide the services under this RFP. We are an enrolled MaineCare provider and have been providing this service since 1996. We have a committed network of providers with whom we maintain strong professional working relationships. We have an organizational structure with policies and procedures that support the work of providing the Fiscal Agent for Atypical Services to Section 19 members. We have 28 years of delivering Environmental Modifications, Assistive Technology (added 2014), Personal Emergency Response Services (PERS) and Facility Respite care across the State of Maine. In 2022, we began receiving referrals serving the needs of the Homeward Bound (MFP) clients. During the period of increased services under the Public Health Emergency, we quickly were able to pivot to provide additional supports to the clients during the COVID pandemic. As an organization, we have a historical knowledge of the long term services and supports system and are key partners in LTSS Systems meetings.

SeniorsPlus will be able to provide this service without a start-up period or need for transition. We have a seasoned staff, a stable provider base, statewide presence, and multiple years of experience working with MaineCare and the Office of Aging and

**Disability Services.**

SeniorsPlus is a Maine nonprofit agency that has been operating in the State of Maine since 1972. We have over 50 years of experience working in the field of aging and disabilities. Our care coordination and Atypical Services coverage is statewide and we have a seasoned staff committed to helping people remain at home. We have a wholly owned subsidiary called SPLLC, which is a fiscal intermediary that serves self directing clients from Sections 19, 96 and 63 of the LTSS system.

**Signature of person authorized to enter into the contract with the Department:**

**Name (Print):**

Betsy Sawyer-Manter

**Title:**

CEO

**Authorized Signature:**



**Date:**

4/10/2024

Janet T. Mills  
Governor

Sara Gagné-Holmes  
Acting 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# 202402038  
Fiscal Agent for Atypical Services**

**I. Summary**

Through RFP# 202402038 Fiscal Agent for Atypical Services the Department sought proposals for a Fiscal Agent to provide coordination and monitoring of certain “Atypical” or specialized services for older adults and adults with disabilities. Two (2) Bidders responded to the RFP:

HR Alliance, Inc.  
SeniorsPlus

Through the evaluation process, SeniorsPlus 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 five (5) State employees, verified the Bidders’ eligibility requirements and applied the consensus method in scoring the Bidders’ Qualifications & Experience and Proposed Services. Scores for the Cost Proposals were assigned using a mathematical formula with the Team providing a consensus score for the budget narrative.

**III. Qualifications & Experience of Conditional Awardee**

SeniorsPlus 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**

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

**V. Cost Proposal and Budget Narrative**

SeniorsPlus provided the lowest proposed cost of \$109.51 per Member per Month with a Budget Narrative.

**VI. Conclusion**

Out of 100 possible points, the Evaluation Team awarded SeniorsPlus a score of 84.00. The strength of the SeniorsPlus proposal outweighed the other Bidder through its qualifications and experience and the services and cost it proposed. The Evaluation Team determined that the proposal submitted by SeniorsPlus represents the best value to the State of Maine.

Janet T. Mills  
Governor

Sara Gagné-Holmes  
Acting Commissioner



Maine Department of Health and Human Services  
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Augusta, Maine 04333-0011  
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TTY: Dial 711 (Maine Relay)

Jul-02-2024

Via Electronic Mail: [jonsuan@hragroup.net](mailto:jonsuan@hragroup.net)

HR Alliance, Inc.  
Jonathan Suan  
3290 West Big Beaver Road, Suite 510  
Troy, MI 48084

SUBJECT: Notice of Conditional Contract Award under RFP #202402038 Fiscal Agent  
for Atypical Services

Dear Jonathan Suan,

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

- SeniorsPlus

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

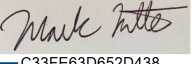
As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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

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

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

Sincerely,

DocuSigned by:  
  
C33FE63D652D438...  
Mark Lutte  
Chief Operating Officer  
Office of Aging and Disability Services

DocuSigned by:  
  
5DC6307B8558482...  
Debra Downer  
Deputy Director for Competitive Procurement  
Division of Contract Management



Janet T. Mills  
Governor

Sara Gagné-Holmes  
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Tel.: (207) 287-3707; Fax: (207) 287-5031  
TTY: Dial 711 (Maine Relay)

Jul-02-2024

Via Electronic Mail: [tsmith@seniorsplus.org](mailto:tsmith@seniorsplus.org)

SeniorsPlus  
Tracy Smith, LTSS Director  
8 Falcon Road  
Lewiston, ME 04240

SUBJECT: Notice of Conditional Contract Award under RFP #202402038 Fiscal Agent for Atypical Services

Dear Tracy Smith,

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

- SeniorsPlus

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

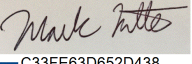
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:  
  
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Mark Lutte  
Chief Operating Officer  
Office of Aging and Disability Services

DocuSigned by:  
  
5DC6307B8558482...  
Debra Downer  
Deputy Director for Competitive Procurement  
Division of Contract Management

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** HR Alliance, Inc.

**DATE:** June 20-21, 2024

\*\*\*\*\*

**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Brittany Hall

**Names of Evaluators:** Doreen McDaniel, Esther Miller, Allison Toomey, Alecia Swihart, and Heather Bingelis

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>X</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>9.00</b>
Section III. Proposed Services	<b>40.00</b>	<b>12.00</b>
Section IV. Cost Proposal		
a. Cost Proposal	25.00	15.64
b. Budget Narrative	5.00	2.00
Section IV Total	<b>30.00</b>	<b>17.64</b>
<u>Total Points</u>	<u>100.00</u>	<u>38.64</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** HR Alliance, Inc.

**DATE:** June 20-21, 2024

\*\*\*\*\*

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

- |   |
|---|
| <ul style="list-style-type: none"><li>• Bidder submitted a signed Attestation Statement (Appendix C).</li></ul> |
|---|

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** HR Alliance, Inc.

**DATE:** June 20-21, 2024

\*\*\*\*\*

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>9.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• Provided 3 project examples consisted of FMS projects for self-direct program participants but does not align with the services requested; no example provided of coordination of Environmental Modifications, Assistive Technology, Respite, PERS, household start-up purchases, etc.</li> <li>• 14 years of experience providing financial management services cited does not demonstrate relevant experience.</li> <li>• Leadership within organization includes experience with budgeting, forecasting, and reporting and provided evidence of ability to review invoices and track expenditures.</li> <li>• Experience cited is related to individuals with developmental disability, however aging population is also referenced.</li> <li>• Points to expertise in fiscal agent services and human resources, technology and accessibility, individual-centered approach, and highlights other relevant qualifications.</li> <li>• Refers to the opportunity to extend services in “California”, not Maine.</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• Listed Direct Care Innovations (DCI) as their subcontractor.</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Provided a basic diagram with limited information.</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• Indicated none.</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• Did not meet requirements as there was no evidence of statements audited or reviewed by a Certified Public Accountant.</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Did not meet requirements as they only provided an insurance “proposal”.</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** HR Alliance, Inc.

**DATE:** June 20-21, 2024

\*\*\*\*\*

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40.00</b>	<b>12.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• Provided a detailed response to address administrative functions but did not provide specific details on how they would meet these requirements.</li> <li>• Refers to leveraging established connections with case managers and providers. Unclear how these connections will support service provisions within the State of Maine.</li> <li>• Primary focus is on developmental services.</li> <li>• Cited adeptness in negotiating contracts.</li> <li>• Reference to FMS services, which is not within scope of this RFP.</li> <li>• Cites Assistive Technology only in reference to remote monitoring and transmission but neglected to expand on other areas of Assistive Technology or procurement.</li> <li>• Did not provide details related to Section 19 of MBM or standards to ensure compliance.</li> <li>• Did not provide details for methods to complete assessments.</li> <li>• Cited capabilities regarding Institutional Respite Care of, “streamlined scheduling and shift trading features” that does not demonstrate an understanding of Institutional Respite Care.</li> <li>• Did not provide an explanation about the actual reimbursement process.</li> <li>• Direct Care Innovations (DCI) platform will review invoices for accuracy related to service delivery, duration and frequency as well as identify errors.</li> <li>• Did not discuss when errors will be communicated timely to ASPs or the reconciliation process.</li> <li>• Proposed offering incentives for survey completion but did not provide details on how this would be accomplished.</li> <li>• Plans to do research to determine best practices for design and implementation of survey.</li> </ul>
<b>B. Atypical Services Requirements</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** HR Alliance, Inc.

**DATE:** June 20-21, 2024

\*\*\*\*\*

- Plans to utilize coordinators relying on technology solutions to work with local individuals/companies that provide these services but did not demonstrate an understanding of Atypical Services in Maine.
- Plans to have open communication with members to discuss progress, address concerns to ensure goals and preferences are being met.
- Incorrectly references FAAS as “Functional Area Assessment System”.
- It is unclear how updates and changes would be communicated.
- Plans to utilize Real-Time Authorization Management Module.
- Plans to utilize REVVER Document Management System and Direct Care Innovations Management Platform.

**C. Appeals, Complaints and Violation Process**

- Did not address the completion of hearing report.
- Did not demonstrate an understanding of their role as a witness.
- Software platform in place to support monitoring and reporting.
- It is unclear why Electronic Visit Verification (EVV), scheduling/attendance tracking, and caregiver fulfillment of duties is referenced.
- Proposes to facilitate discussions between ASPs and FAAS. The selected vendor would be the FAAS.
- Did not outline course of action when intentional violation occurs, timely reporting of violations, or termination of ASP contract.
- Did not specifically agree to report all ASP violations to the Department within 24-hours.

**D. MaineCare Claims**

- Met the requirements.

**E. Information Management**

- Did not outline support for ASPs who do not have access to electronic reporting.

**F. Performance Measures**

- Referenced services outside the scope of the RFP requirements.

**G. Reports**

- Plans to utilize REVVER software platform to capture required data.

**2. Staffing**

- References the utilization of multiple subcontractors, however, there is only one (1) subcontractor/consultant provided in Part IV, Section II.
- Did not indicate with specificity how they plan to oversee and manage the subcontractor as identified in Part IV, Section II.

**3. Implementation - Work Plan**

- Provided a timeline chart for the initial 3-months which does not meet the requirements.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

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**BIDDER:** HR Alliance, Inc.

**DATE:** June 20-21, 2024

\*\*\*\*\*

**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal		
<b>a.</b> Cost Proposal	25.00	15.64
<b>b.</b> Budget Narrative	5.00	2.00
Section IV Total	<b>30.00</b>	<b>17.64</b>

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$109.51</b>	÷	<b>\$175.00</b>	x	<b>25.00 points</b>	=	<b>15.64</b>

**Evaluation Team Comments:**

- |   |
|---|
| <ul style="list-style-type: none"> <li>• Budget narrative shows distribution of costs.</li> <li>• Cost proposal lacks detail.</li> <li>• Conflicting cost in narrative section referring to \$150 PM/PM.</li> </ul> |
|---|



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** SeniorsPlus

**DATE:** June 20-21, 2024

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**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Brittany Hall

**Names of Evaluators:** Doreen McDaniel, Esther Miller, Allison Toomey, Alecia Swihart, and Heather Bingelis

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>X</b>	
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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

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**BIDDER:** SeniorsPlus

**DATE:** June 20-21, 2024

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**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

- |   |
|---|
| <ul style="list-style-type: none"><li>• Bidder submitted a signed Attestation Statement (Appendix C).</li></ul> |
|---|

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** SeniorsPlus

**DATE:** June 20-21, 2024

\*\*\*\*\*

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30.00</b>	<b>25.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• Vendor of FAAS for 28 years; stand-alone Fiscal Agent for Atypical Waiver Services (Waiver Services Provider) since 2009 (current vendor).</li> <li>• Provided three (3) relevant project examples including their current role of Atypical Services Provider and a list of positive client feedback.</li> <li>• Experience in target population from a variety of business models (AAA, Care Coordination, FMS, and FAAS).</li> <li>• Is the area agency on aging for Western Maine.</li> <li>• Cites a broad array of experience working with older and disabled adults and their families.</li> <li>• Has a statewide presence, and established relationships with DHHS (including MaineCare), other SCAs, and local providers of services.</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• Indicated none.</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Met the requirements.</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• Indicated none.</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• Audited financial statements are provided for 2020-2023.</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Met the requirements.</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** SeniorsPlus

**DATE:** June 20-21, 2024

\*\*\*\*\*

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40.00</b>	<b>31.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• Maintains an existing network of providers and actively advertises and recruits ASPs.</li> <li>• Did not indicate how provider bids are obtained.</li> <li>• Did not definitively affirm compliance with Section 19 of the MBM.</li> <li>• Provided an explanation of member support.</li> <li>• Plans to notify ASPs in 3 days when invoices have errors.</li> <li>• Plans to include the ASP to research MaineCare denials; it is unclear why the ASP would be included.</li> <li>• Included ability to include Performance Measures if requested.</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• Plans to provide services in accordance with the plan of care, and that follow up is done with the SCA, as needed.</li> <li>• Response delegated the arrangement for evaluations to the SCA which does not align with the scope of services.</li> <li>• Demonstrated experience with utilizing DHHS SharePoint for complaints.</li> </ul>
<b>C. Appeals, Complaints and Violation Process</b>
<ul style="list-style-type: none"> <li>• Demonstrated knowledge of current processes for addressing appeals and hearings.</li> <li>• Per Part IV Proposal Submission Requirements, the content provided is considered minimally responsive.</li> </ul>
<b>D. MaineCare Claims</b>
<ul style="list-style-type: none"> <li>• Met the requirements.</li> </ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"> <li>• Met the requirements.</li> </ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"> <li>• Provided an example of a consumer satisfaction survey.</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER:** SeniorsPlus

**DATE:** June 20-21, 2024

\*\*\*\*\*

<b>G. Reports</b>
<ul style="list-style-type: none"><li>• Recommended condensing the Authorization report and Atypical Services Census report to align with their own current reporting practices.</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• It is unclear whether Specialized Services Coordinator referenced in job descriptions is same as Referral Coordinator referenced in the staffing plan.</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Per Part IV Proposal Submission Requirements, the content provided is considered minimally responsive.</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402038

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**BIDDER:** SeniorsPlus

**DATE:** June 20-21, 2024

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**EVALUATION OF SECTION IV  
Cost Proposal**

	<u>Points Available</u>	<u>Points Awarded</u>
Section IV. Cost Proposal		
a. Cost Proposal	25.00	25.00
b. Budget Narrative	5.00	3.00
Section IV Total	<b>30.00</b>	<b>28.00</b>

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$109.51</b>	÷	<b>\$109.51</b>	x	<b>25.00 points</b>	=	<b>25.00</b>

**Evaluation Team Comments:**

- |   |
|---|
| <ul style="list-style-type: none"> <li>• Budget Narrative states the costs are based on projected referral volume, staffing resources, and agency expenses.</li> <li>• Budget Narrative lacked an explanation of the basis for determining the proposed Cost Per Member Per Month Fee.</li> </ul> |
|---|

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** HR Alliance, Inc.

**DATE:** 06/17/2024

**EVALUATOR NAME:** Heather Bingelis

**EVALUATOR DEPARTMENT:** DHHS/OMS

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part I. Preliminary Information</b>
<b>Eligibility Requirements</b>
Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes: <b>a. Appendix C (Attestation Statement)</b>
Entities submitting a bid under this RFP may not be a provider of the underlying Atypical and specialized services being coordinated and billed under this RFP.
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• 14 years – “Several counties in Michigan”</li> <li>• Bidder met the requirements</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• One subcontractor listed - Direct Care Innovations</li> <li>• Bidder met the requirements</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Bidder minimally met the requirements</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• None noted</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• Documentation provided is not validated by a CPA.</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Q - Bidder included “Insurance Proposal” - not a “Certificate of Insurance.”</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** HR Alliance, Inc.

**DATE:** 06/17/2024

**EVALUATOR NAME:** Heather Bingelis

**EVALUATOR DEPARTMENT:** DHHS/OMS

\*\*\*\*\*

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• Bidder notes leveraging current network – none of the connections/contacts are in maine. The bidder does not have offices in Maine.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met requirements</li> <li>• (Q) - Bidder notes capabilities re Respite of, “streamlined scheduling and shift trading features”. However, this would NOT be a required task of the FAASP in facility-based respite</li> <li>• (I) – “Through rigorous quality control measures and ongoing communication with stakeholders...” However, the bidder did not expound on these</li> </ul>
<ul style="list-style-type: none"> <li>• Q – did not see specific reference to requirement to notify ASPs within 7 days of errors within bidder’s response.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> <li>• I- may offer incentives to respondents though the bidder did not mention whether and how these incentives would be funded</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements – states would ensure the bidder is enrolled at the outset of the contract</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<ul style="list-style-type: none"> <li>• Q – the following two seemingly contradictory statements:  “Utilizing our established network of service providers and subcontractors, we will procure the necessary resources and expertise to fulfill each Member's unique requirements effectively.”  AND  “Through APPENDIX G RFP# 202402038 Fiscal Agent for Atypical Services DHHS Response Submission Document (Rev. 9/2023) targeted outreach efforts and collaborative partnerships, we will expand our network to encompass a wide range of ASPs capable of delivering high-quality, person-centered care.”</li> </ul>
<ul style="list-style-type: none"> <li>• The Bidder met requirements –</li> <li>• Q -Bidders description of the use of subcontractors in this section. Also, noted functions that are outside the scope of the RFP and the role of the FAASP (i.e financial counseling to Members).</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>



**STATE OF MAINE  
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\*\*\*\*\*

<ul style="list-style-type: none"> <li>• Q – Bidder again mentioned the potential use of subcontractors or consultants here – Bidder has only ID’d one subcontractor with the associated section – how is this being accounted for in the financial breakdown for this Bidder?</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> <li>• Q – again Bidder mentions potential use of subcontractors for this section.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements – will use the DCI platform to accomplish the transmittal of Service Orders.</li> </ul>
<ul style="list-style-type: none"> <li>• Q– Bidder states, “...we guarantee the safety and legality of the modifications.”</li> <li>• Q – Paragraph “d.” – statement referencing the use of subcontractors for the “transmission of Services Orders”. Looks as though this was erroneously copied and pasted from previous section? Additionally, bidder mentions the use of ONE subcontractor in App D.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements – noting that the DCI platform allows for notification to the ASP when the Member is nearing the cost cap etc.</li> <li>• Bidder again mentions no subcontractors used in the transmission of service orders – Q – how does this fit in this section?</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements – plans to use “REVER Document Management System and the Direct Care Innovations (DCI) Management Platform.”</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met requirements</li> <li>• I – Bidder commits to, “identifying reported issues within a stringent timeframe of forty-eight (48) hours.”</li> </ul>
<p><b>C. Appeals, Complaints and Violation Process</b></p>
<ul style="list-style-type: none"> <li>• develop a comprehensive checklist outlining the specific policy requirements outlined in 10-144 C.M.R. Ch. 1</li> <li>• use of Peer Review Mechanism</li> <li>• use of QC methods such as: regular audits of review outcomes, internal checks for compliance with established protocols, and corrective action plans to address any identified deficiencies.</li> <li>• Q – Bidder does not refer to reporting of issues to OADS or the Dept.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder’s response incorporates info/tasks that infer a lack of understanding of the expectation in the RFP or that are outside the scope of work.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder’s response incorporates info/tasks that infer a lack of understanding of the expectation in the RFP or that are outside the scope of work..</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder does not specifically agree to report all asp violations to the Dept within 24-hours</li> </ul>
<p><b>D. MaineCare Claims</b></p>

**STATE OF MAINE  
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**DATE:** 06/17/2024

**EVALUATOR NAME:** Heather Bingelis

**EVALUATOR DEPARTMENT:** DHHS/OMS

\*\*\*\*\*

<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>G. Reports</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Minimally meets</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder outlined how subcontractors/consultants “if used” will be managed. However the Bidder noted at the outset of the RFP the use of DCI as the only sub-contractor. The Bidder does not indicate with specificity the oversight and management related to DCI.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder partially meets the requirements. Bidder does not detail with specificity tasks associated with specific positions.</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>• Bidder does not meet requirements – work plan is for three months.</li> </ul>
<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"> <li>• Bidder does not give rationale for dollar amounts associated with stated costs – therefore stated costs seem random.</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** HR Alliance, Inc.

**DATE:** June 12, 2024

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/OADS

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part I. Preliminary Information</b>
<b>Eligibility Requirements</b>
Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes: <b>a. Appendix C (Attestation Statement)</b>
Entities submitting a bid under this RFP may not be a provider of the underlying Atypical and specialized services being coordinated and billed under this RFP.
<ul style="list-style-type: none"> <li>The required attestation is provided.</li> </ul>

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>14 years of experience providing financial management services in Michigan</li> <li>Experience cited is related to individuals with developmental disability, however aging population is also referenced.</li> <li>The Bidder points to expertise in fiscal agent services and human resources, technology and accessibility, individual-centered approach, and highlights other relevant qualifications.</li> <li>The Bidder refers to the opportunity to extend services in California (not Maine).</li> <li>Provided 3 examples of fiscal intermediary services for clients opting to self-direct</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>The Bidder lists 1 subcontract with a technology company (Direct Care Innovations) for web portal</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>A basic diagram is provided, showing several key roles/functions.</li> </ul>

**STATE OF MAINE  
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\*\*\*\*\*

<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• The Bidder indicates no litigation.</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Balance sheets are provided for year-end 2021, 2022, and 2023.</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• The Bidder provided an insurance proposal.</li></ul>

**STATE OF MAINE  
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\*\*\*\*\*

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided to address administrative functions</li> <li>• Bidder refers to leveraging established connections, however, do not mention establishing new ones in Maine.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> <li>• Bidders refers to roles of contractors/consultants as work they “may” or “could” do.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder cites use of software to manage invoices/payments.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder states their plan and intention to comply with this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder states their plan and intention to comply with this requirement.</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• Bidder provided a detailed response.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder provided detailed response, which includes an intention to meet this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided, which includes an intent to comply with this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• The Bidder provided a detailed response.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> <li>• The Bidder uses Real-Time Authorization Management Module</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> <li>• The Bidder uses REVVER Document Management System and Direct Care Innovations Management Platform.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<b>C. Appeals, Complaints and Violation Process</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided, indicating the Bidder’s plan and intent to meet this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided, indicating the Bidder’s plan and intent to meet this requirement.</li> </ul>

**STATE OF MAINE  
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\*\*\*\*\*

<ul style="list-style-type: none"> <li>• A detailed response is provided, indicating the Bidder’s plan and intent to meet this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided, indicating the Bidder’s plan and intent to meet this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided, indicating the Bidder’s plan and intent to meet this requirement.</li> </ul>
<b>D. MaineCare Claims</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<b>G. Reports</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Met requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• The Bidder indicates that subcontractors/consultants may be used, and if so, describes how they will be vetted and selected.</li> </ul>
<ul style="list-style-type: none"> <li>• Met requirement.</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>• A timeline chart is provided for the initial 3-months.</li> </ul>

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"> <li>• \$175 PM/PM</li> <li>• Budget narrative shows breakdown of costs per function/role</li> <li>• Conflicting cost in narrative section referring to \$150 PM/PM</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** HR Alliance, Inc.

**DATE:** 06-17-2024

**EVALUATOR NAME:** Esther Miller

**EVALUATOR DEPARTMENT:** DHHS – Office of Aging and Disability Services

\*\*\*\*\*

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**Individual Evaluator Comments:**

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<ul style="list-style-type: none"> <li>• Appears eligible</li> </ul>
<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• Bidder provides overview</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• Bidder uses subcontractors and provides required information</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Provided, but seems a bit sloppy and more like a rough draft</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• None listed</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• Did not meet requirements</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Unsure if “Insurance Proposal” is the same thing as a Certificate of Insurance</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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**BIDDER NAME:** HR Alliance, Inc.

**DATE:** 06-17-2024

**EVALUATOR NAME:** Esther Miller

**EVALUATOR DEPARTMENT:** DHHS – Office of Aging and Disability Services

\*\*\*\*\*

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• Bidder says they will provide administrative functions and writes at length to support that statement, but I'm not clear how the Bidder is going to do this.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder talks about assessments and uses a lot of language that feels auto-generated to support completing assessments. However, Bidder is not located in Maine and it's unclear how the assessments will actually be completed.</li> </ul>
<ul style="list-style-type: none"> <li>• Reimbursement relies on technology solution belonging to a third-party software company. Lots of text about how great the solution is and that they make sure it all works well, but no explanation about the actual reimbursement process.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder will attend meetings monthly remotely and quarterly at locations determined by the Department. Example of flowery language: "To accomplish these tasks, HR Alliance, Inc. will utilize various methods and resources tailored to facilitate efficient and productive meeting attendance. Our team will actively engage in conference calls and web conferences, leveraging technology to ensure seamless participation regardless of location." The extra sentence at the beginning doesn't fill me with any amount of confidence in this Bidder's ability to do the work better than any other Bidder.</li> </ul>
<ul style="list-style-type: none"> <li>• There is a whole science to developing and administering surveys well, and while the Bidder states they will do so and goes on and on to make it all sound great, I don't see any meaningful experience in survey design, distribution, data collection, or analysis.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder states they will enroll and a MaineCare provider by the start of the Initial Period of Performance. That meets the requirement, but there's a lot to the provider enrollment process and I'm not clear if enrolling is the same thing as being approved, or how long the provider enrollment process takes at OMS. Is this timeline (that the Department put in the RFP) actually sufficient for the provider to receive reimbursement for services timely?</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• Coordinators will rely on technology solutions to work with presumably local individuals/companies that provide these services. There's again a lot of jargon that makes the proposal seem really great, but there's not any real meat here that explains how these coordinators will ensure service deliver occurs.</li> </ul>
<ul style="list-style-type: none"> <li>• It's not clear by the RFP how detailed a person's Plan of Care is. Having read many POC documents in a previous career, I don't feel confident that this Bidder understands that installing grab bars according to the Plan of Care</li> </ul>



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INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** HR Alliance, Inc.

**DATE:** 06-17-2024

**EVALUATOR NAME:** Esther Miller

**EVALUATOR DEPARTMENT:** DHHS – Office of Aging and Disability Services

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<p>actually doesn't provide any project specifications. The Bidder says they will do the thing, but again doesn't seem to provide meaningful examples of how.</p>
<ul style="list-style-type: none"> <li>• This is a new provider without an existing network in Maine, so first they will need to build an ASP network. From the proposal, it looks like the Bidder intends to build a network that meets the need as stated in the RFP.</li> </ul>
<ul style="list-style-type: none"> <li>• They will rely on a third-party technology solution to accomplish this.</li> </ul>
<ul style="list-style-type: none"> <li>• They will meet regularly with the SCAs and there will be a lot of streamlining.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder will enter into agreements with ASPs specifying service expectations, compliance requirements, and protocols for communication and reporting. This is the first time in this proposal I feel like there is a "how" explained.</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<p><b>C. Appeals, Complaints and Violation Process</b></p>
<ul style="list-style-type: none"> <li>• Bidder provided a bulleted list of the steps they will take to handle administrative hearings. I feel pretty confident they can do this.</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard with detailed list of steps Bidder will take.</li> </ul>
<p><b>D. MaineCare Claims</b></p>
<ul style="list-style-type: none"> <li>• Bidder explains a process and meets standard, though I'm not sure what they have written is exactly the process that MC providers have to follow for claims submission.</li> </ul>
<p><b>E. Information Management</b></p>
<ul style="list-style-type: none"> <li>• Bidder will rely on the same third-party technology solution referenced previously. A lot of the references to this solution include words like "seamless" and "comprehensive" which sound great but again don't really add substance to the response. They do say there are no subcontractors or consultants directly involved, however there may be some vendors working for the technology solution company.</li> </ul>
<p><b>F. Performance Measures</b></p>
<ul style="list-style-type: none"> <li>• Meets standard with some clarifying points.</li> </ul>
<p><b>G. Reports</b></p>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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<ul style="list-style-type: none"><li>• Meets standard with some clarifying points.</li></ul>
<ul style="list-style-type: none"><li>• Meets standard with some clarifying points.</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Refers to Attachment 7</li></ul>
<ul style="list-style-type: none"><li>• Bidder gives decent amount of details about managing these relationships.</li></ul>
<ul style="list-style-type: none"><li>• Refers to Attachment 8</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• The work plan gives two full months before they even start establishing an ASP network.</li></ul>

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>•</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** HR Alliance, Inc.

**DATE:**6/17/24

**EVALUATOR NAME:** Alecia Swihart

**EVALUATOR DEPARTMENT:** DHHS OADS

\*\*\*\*\*

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**Individual Evaluator Comments:**

<b>Part I. Preliminary Information</b>
<b>Eligibility Requirements</b>
Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes: <ul style="list-style-type: none"> <li><b>a. Appendix C (Attestation Statement)</b></li> </ul> <p>Entities submitting a bid under this RFP may not be a provider of the underlying Atypical and specialized services being coordinated and billed under this RFP.</p> <ul style="list-style-type: none"> <li>• Bidder met the requirement</li> </ul>
<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• Q- Experience focuses on fiscal intermediary for individuals with developmental disability/mental health</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• I- Technology company supporting development of web portal</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Organizational chart provided</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• No litigation pending</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• Q- Provided required three years, uncertain who performed</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirement</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

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**BIDDER NAME:** HR Alliance, Inc.

**DATE:**6/17/24

**EVALUATOR NAME:** Alecia Swihart

**EVALUATOR DEPARTMENT:** DHHS OADS

\*\*\*\*\*

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• Q- Focus on developmental services</li> <li>• Q- Subcontractor involvement may extend beyond tech company</li> </ul>
<ul style="list-style-type: none"> <li>• Q- Uncertain whether bidder understands services as provided through S19</li> </ul>
<ul style="list-style-type: none"> <li>• P- Process and software in place</li> <li>• Q- Automated invoice management, uncertain if contractors would be required to access a portal</li> </ul>
<ul style="list-style-type: none"> <li>• P- Willing to attend meetings as required</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder has plan for survey development</li> </ul>
<ul style="list-style-type: none"> <li>• I – Not current MaineCare provider</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• I- Care givers mentioned under institutional respite</li> <li>• Q- Alludes to use of subcontractors/consultants</li> </ul>
<ul style="list-style-type: none"> <li>• Q- Specifies delivery of services without subcontractors/consultants</li> </ul>
<ul style="list-style-type: none"> <li>• N- No existing ASP network</li> <li>• Q- ASPs to notify the Functional Area Assessment System, uncertain if there is a portal requirement</li> </ul>
<ul style="list-style-type: none"> <li>• Q- Uncertain if members have access to support related to budgetary concerns outside of portal environment</li> </ul>
<ul style="list-style-type: none"> <li>• P- Portal will facilitate referrals and updates to Service Coordination Agency</li> </ul>
<ul style="list-style-type: none"> <li>• I- Anticipation of use of subcontractors</li> </ul>
<ul style="list-style-type: none"> <li>• I- References extensive ASP network</li> </ul>
<ul style="list-style-type: none"> <li>• P- Portal supports email communications</li> </ul>
<ul style="list-style-type: none"> <li>• Q- No subcontractors noted uncertain which staff would be conducting the on-site visits for quality monitoring and for how many members</li> </ul>
<ul style="list-style-type: none"> <li>• I- Authorization management training for ASP</li> <li>• Q- Uncertain whether bidder understands how ASP will be paid</li> </ul>
<ul style="list-style-type: none"> <li>• P- Platforms for documentation in place</li> </ul>
<ul style="list-style-type: none"> <li>• P- Had plan to monitor/address complaints</li> </ul>
<b>C. Appeals, Complaints and Violation Process</b>
<ul style="list-style-type: none"> <li>• Q- Addressed appeal review but not completion of hearing report</li> </ul>
<ul style="list-style-type: none"> <li>• P- Had plan to ensure case hearing packets are prepared accurately</li> </ul>
<ul style="list-style-type: none"> <li>• N- Did not demonstrate understanding of role in response</li> </ul>
<ul style="list-style-type: none"> <li>• P- Platform in place to support reporting</li> </ul>

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<ul style="list-style-type: none"><li>• P-Outlined plan to monitor and address complaints</li></ul>
<b>D. MaineCare Claims</b>
<ul style="list-style-type: none"><li>• Has experience with similar billing</li></ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"><li>• Q- Uncertain whether paper or faxed documents may be received/sent to ASPs</li></ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"><li>• I- References provision of personal care services</li></ul>
<b>G. Reports</b>
<ul style="list-style-type: none"><li>• P- Platform able to capture required data</li></ul>
<ul style="list-style-type: none"><li>• P- Platform able to capture required data</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Attachment provided</li></ul>
<ul style="list-style-type: none"><li>• Information provided</li></ul>
<ul style="list-style-type: none"><li>• Attachment provided</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Q- Delegation to subcontractors limited to billing system software</li></ul>
<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>•</li></ul>

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INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** HR Alliance, Inc.

**DATE:** 5/21/2024

**EVALUATOR NAME:** Allison Toomey

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

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**Individual Evaluator Comments:**

<b>Part I. Preliminary Information</b>
<b>Eligibility Requirements</b>
Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes: <p style="margin-left: 40px;"><b>a. Appendix C (Attestation Statement)</b></p> <p>Entities submitting a bid under this RFP may not be a provider of the underlying Atypical and specialized services being coordinated and billed under this RFP.</p> <ul style="list-style-type: none"> <li>• met</li> </ul>

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• N- 3 project examples were of FMS projects for self-direct program participants. Scope does not align with the services requested; no example provided of coordination of Environmental Modifications, Assistive Technology, Respite, PERS, household start-up purchases, etc.</li> <li>• P- Leadership within organization includes experience with budgeting, forecasting, and reporting</li> <li>• P- Evidence of ability to review invoices and track expenditures.</li> <li>• Q- Unclear if bidder understands scope of work.</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• P- DCI’s platform offers robust reporting capabilities to analyze trends, monitor service utilization, and identify areas of improvement.</li> <li>• N- unclear in narrative how DCI will interface with Atypical Service coordination/management.</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Included; not detailed.</li> </ul>

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<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• P- no litigation</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• N-Provided balance sheets no evidence of CPA review.</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• N- documents provided indicate a "proposal" of insurance. Unclear if this is a valid certificate.</li></ul>

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Part IV, Section III Proposed Services
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• P- 14 years of experience with administrative tasks.</li> <li>• P- adeptness in negotiating contracts</li> <li>• I- reference to subcontractors being tasked with provider searches, administrative tasks, etc.. Unclear which subcontractors will be responsible for this as DCI is the only subcontractor mentioned and DCI is referenced in relation to authorization, payroll, training, and billing compliance.</li> <li>• I- leveraging established connections with case managers and providers. Unclear what connections are established.</li> </ul>
<ul style="list-style-type: none"> <li>• N- reference to FMS services, which is not within scope of this RFP.</li> <li>• N- discussed Assistive technology only in reference to remote monitoring/transmission.</li> <li>• N- no details related to Section 19 of MBM or standards to ensure compliance.</li> <li>• P- provide examples of how remote monitoring can improve independence.</li> </ul>
<ul style="list-style-type: none"> <li>• P- detailed invoice review for accuracy related service, duration, frequency.</li> <li>• P- DCI platform will identify errors.</li> <li>• N- did not discuss how errors will be communicated timely to ASPs or the reconciliation process.</li> </ul>
<ul style="list-style-type: none"> <li>• P- outlined how they will be available for meetings as required.</li> </ul>
<ul style="list-style-type: none"> <li>• P- provider indicates they will complete surveys</li> <li>• P- provider will do research to determine best practice for design and implementation.</li> <li>• I- provider may offer incentives for survey completion.</li> <li>• P- survey will be handled by HR Alliance staff vs. by a subcontractor. This allows for HR Alliance to determine areas of improvement within their subcontractor network.</li> </ul>
<ul style="list-style-type: none"> <li>• P- provider will enroll as a MaineCare Provider.</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• I- discussed overseeing the entire modification process from procurement of materials.</li> <li>• P- discussed staff providing training on PERS devices.</li> </ul>
<ul style="list-style-type: none"> <li>• P- references Assessing Services Agency in relation to the plan of care.</li> <li>• Q/I- HR Alliance team members will undergo training on specific requirements in care plans.</li> </ul>



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<ul style="list-style-type: none"> <li>• P- open communication with members to discuss progress, address concerns to ensure goals and preferences are being met.</li> </ul>
<ul style="list-style-type: none"> <li>• Q- reference FAAS as Functional Area Assessment System.</li> </ul>
<ul style="list-style-type: none"> <li>• P- members will have option to identify their own ASP.</li> <li>• I- personalized financial counseling sessions. May be out of scope?</li> </ul>
<ul style="list-style-type: none"> <li>• P- provider will accept referrals from SCA and monitor effectiveness of processes.</li> </ul>
<ul style="list-style-type: none"> <li>• P- Provider outlines basic requirements from policy.</li> <li>• P- Provider indicates evaluations will be completed by qualified professional to obtain recommendations for appropriate interventions.</li> <li>• P- referenced AT needing to enhance member daily functioning and quality of life.</li> </ul>
<ul style="list-style-type: none"> <li>• P- will obtain quotes to optimize resource utilization</li> <li>• P- Financial Analysts will review quotes to assess cost effectiveness of quotes.</li> </ul>
<ul style="list-style-type: none"> <li>• P- Automatic alerts/notifications for ASP</li> </ul>
<ul style="list-style-type: none"> <li>• P- HR Alliance will ensure ASPs meet appropriate requirements</li> <li>• P- HR Alliance will conduct visits.</li> </ul>
<ul style="list-style-type: none"> <li>• P- multiple modes of communication channels with ASPs.</li> </ul>
<ul style="list-style-type: none"> <li>• P- Has a documentation system REVVER</li> </ul>
<ul style="list-style-type: none"> <li>• Met expectation</li> </ul>
<p><b>C. Appeals, Complaints and Violation Process</b></p>
<ul style="list-style-type: none"> <li>• Met expectations.</li> </ul>
<ul style="list-style-type: none"> <li>• Met expectations</li> </ul>
<ul style="list-style-type: none"> <li>• I- (b 2<sup>nd</sup> bullet) narrative outlines HR Alliance plans to have a legal representative to advocate for members during hearings including prep sessions with witnesses, review of case files, and testimonies. This is out of scope as the RFP states HR Alliance will be a witness and will provide testimony about their decisions.</li> </ul>
<ul style="list-style-type: none"> <li>• Q- unclear why EVV, scheduling/attendance tracking, and caregiver fulfillment of duties is referenced.</li> <li>• P- outlined internal controls to be developed to promote compliance with laws/regs.</li> </ul>
<ul style="list-style-type: none"> <li>• Q- facilitate discussions between ASPs and FAAS. The selected vendor is FAAS.</li> <li>• N- did not outline course of action when intentional violation occurs, timely reporting of violations, or termination of ASP contract.</li> </ul>
<p><b>D. MaineCare Claims</b></p>

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<ul style="list-style-type: none"> <li>• Met expectations.</li> </ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"> <li>• Met expectations.</li> </ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"> <li>• Q- integration of 3<sup>rd</sup> party data sources. Unclear how this will support meeting these PMs.</li> <li>• P- Implementing automated alert mechanisms and real-time monitoring tools to ensure compliance.</li> </ul>
<b>G. Reports</b>
<ul style="list-style-type: none"> <li>• Met expectations.</li> <li>• Met expectations</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Q- FMS Coordinator is the project lead?</li> <li>• Q- unsure if bidder understands scope of project.</li> <li>• Provided staff positions titles and job descriptions as required.</li> </ul>
<ul style="list-style-type: none"> <li>• Met expectation</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>• Q: uncertain if provider demonstrates understanding of scope of project.</li> </ul>
<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"> <li>•</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** SeniorsPlus

**DATE:** 06/17/2024

**EVALUATOR NAME:** Heather Bingelis

**EVALUATOR DEPARTMENT:** DHHS/OMS

\*\*\*\*\*

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<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• N/A – Bidder met the requirements for completing the form.</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• None – Bidder completed the form</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** SeniorsPlus

**DATE:** 06/17/2024

**EVALUATOR NAME:** Heather Bingelis

**EVALUATOR DEPARTMENT:** DHHS/OMS

\*\*\*\*\*

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• Bidder met requirements</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements – did not definitively affirm compliance with Sec 19</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements noting three-day timeframe to contact ASP when there are errors as well as follow up with the ASP and SCA to resolve denials</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder confirms continuation of attendance at meetings as requested in person or virtually.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements – noting use of department-approved instrument. Bidder confirms ability to add Performance Measures as requested.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder is currently enrolled as a MaineCare provider.</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• Bidder met the requirements – notes ability to follow up with member/rep when needed to ensure work is completed. Bidder did not indicate whether on-site evaluation of work completed is a current practice.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder outlined current practice with re to service coordination of Atypical Services – and did not suggest any changes or enhancements to current practice.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder did not outline how the bidder ensures Atypical Services are delivered in accordance with the plan of care rather that the Bidder ensures the service is listed on the plan.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder’s description aligns with current practice.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements</li> <li>• Bidder noted, “currently have a network of 95 ASPs”.</li> <li>• Bidder notes “staff provide regular guidance and education to contracted ASPs to ensure understanding of program requirements”.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met minimal requirements – noting willingness to work with “Out-of-network” providers to support growing the current ASP network of providers.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder notes, “Our goal is commonly held with the SCAs as a conduit to provide the necessary coordination to maintain the member’s health and well-being.”</li> </ul>
<ul style="list-style-type: none"> <li>• The Bidder did not affirm that evaluations shall be completed prior to providing services. Rather the Bidder stated: 1) “Typically, (the Bidder) coordinates any need for additional evaluation with the SCA.”</li> </ul>
AND

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** SeniorsPlus

**DATE:** 06/17/2024

**EVALUATOR NAME:** Heather Bingelis

**EVALUATOR DEPARTMENT:** DHHS/OMS

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<p>2) “The (Bidder) reviews all Atypical Service referrals and determines if the service type is appropriate.”</p> <ul style="list-style-type: none"> <li>• Bidder relies on the SCA to secure necessary evaluations – the intent of the RFP is that the FAASP would be securing the necessary evaluation.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder affirmed willingness to “obtain at least 2 quotes...” as is required in the RFP.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder stated, “(The Bidder) communicates expectations to the ASP about Environmental Modifications work specification being in accordance with federal, state, and local building codes.” The Bidder affirmed that the Bidder would “Ensure Environmental Modifications are provided and completed by qualified professionals in accordance with applicable federal, State or local building codes...”</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements noting use of, “Service Plans show authorized units/amounts and delivered units/amounts,” as a tracking/compliance tool.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder notes: “ utilizing a Management Information System to maintain documentation about Atypical Services.”</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements noting the following:               <ol style="list-style-type: none"> <li>1. “(Bidder) attempts to resolve issues within 48 hours.”</li> <li>2. “Complaints are recorded using the prescribed process through the DHHS SharePoint site.”</li> </ol> </li> </ul>
<p><b>C. Appeals, Complaints and Violation Process</b></p>
<ul style="list-style-type: none"> <li>• Bidder met the requirements.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder met the requirements.</li> </ul>
<ul style="list-style-type: none"> <li>• Minimal response</li> </ul>
<ul style="list-style-type: none"> <li>• Minimal response</li> </ul>
<p><b>D. MaineCare Claims</b></p>
<ul style="list-style-type: none"> <li>• Bidder met the requirements.</li> </ul>
<p><b>E. Information Management</b></p>
<ul style="list-style-type: none"> <li>• Bidder states, “ (the bidder) utilizes WellSky and SwiftPage ACT to interface with MIMHS.</li> </ul>
<p><b>F. Performance Measures</b></p>
<ul style="list-style-type: none"> <li>• Bidder included sample satisfaction survey</li> </ul>
<p><b>G. Reports</b></p>
<ul style="list-style-type: none"> <li>• Minimal response. Bidder proposed consolidating two reports – the contract negotiation would be the opportunity for the bidder to discuss changes – not within the response to the RFP.</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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- |  |
|--|
| <ul style="list-style-type: none"><li>• Bidder notes will use current reporting processes.</li><li>• Minimal response</li><li>• Q – does the current reporting utilized by the Bidder provide requisite data to the Department as required in the RFP.</li></ul> |
|--|

<b>2. Staffing</b>
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- |  |
|--|
| <ul style="list-style-type: none"><li>• Bidder met the requirements –</li><li>• P - detailed descriptions of titles and job duties</li></ul> |
|--|

- |   |
|---|
| <ul style="list-style-type: none"><li>• Bidder met the requirements – none used</li></ul> |
|---|

- |   |
|---|
| <ul style="list-style-type: none"><li>• Bidder met the requirements</li></ul> |
|---|

<b>3. Implementation - Work Plan</b>
--------------------------------------

- |   |
|---|
| <ul style="list-style-type: none"><li>• Bidder did not display the work plan in a timeline chart – minimally meets requirements</li></ul> |
|---|

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
--

- |   |
|---|
| <ul style="list-style-type: none"><li>• Narrative is brief and that the information does not provide enough detail to fully determine how the bidder arrived at the PMPM.</li></ul> |
|---|

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** SeniorsPlus

**DATE:** June 12, 2024

**EVALUATOR NAME:** Doreen McDaniel

**EVALUATOR DEPARTMENT:** DHHS/OADS

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part I. Preliminary Information</b>
<b>Eligibility Requirements</b>
Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes: <p style="margin-left: 40px;"><b>a. Appendix C (Attestation Statement)</b></p> <p>Entities submitting a bid under this RFP may not be a provider of the underlying Atypical and specialized services being coordinated and billed under this RFP.</p> <ul style="list-style-type: none"> <li>• Bidder provided an attestation, as required.</li> </ul>

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• The Bidder is the area aging on aging for western Maine.</li> <li>• They have been a contracted Service Coordination Agency (SCA) for several long-term care programs since 1996, including the fiscal agent for atypical waiver services.</li> <li>• Stand-alone Fiscal Agent for Atypical Waiver Services (Waiver Services Provider) since 2009 (current vendor)</li> <li>• Bidder cites broad array of experience working with older and disabled adults and their families.</li> <li>• Bidder has a statewide presence, and established relationships with DHHS (including MaineCare), other SCAs, and local providers of services.</li> <li>• Provided 3 examples of projects, including their current role of Atypical Services Provider and a list of positive client feedback</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• The Bidder states no subcontractors.</li> </ul>
<b>3. Organizational Chart</b>

**STATE OF MAINE  
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<ul style="list-style-type: none"><li>• An organizational chart is provided, detailing programmatic, fiscal, and human services roles, titles, names, and including the board members.</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• The Bidder indicates no litigation.</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Audited financial statements are provided for 2020-2023.</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• The Bidder provided a Certificate of Liability Insurance dated 4/2/2024.</li></ul>



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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>The Bidder cites their experience as the current fiscal agent, noting their established relationships with referral sources, and their work to advertise and recruit atypical waiver services providers.</li> </ul>
<ul style="list-style-type: none"> <li>Meets requirement</li> </ul>
<ul style="list-style-type: none"> <li>The Bidder provided a detailed response.</li> </ul>
<ul style="list-style-type: none"> <li>The Bidder states intent to meet this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>The Bidder states intent to meet this requirement.</li> <li>The Bidder indicates that performance measures can be added, and provides relevant examples.</li> </ul>
<ul style="list-style-type: none"> <li>Bidder is an enrolled MaineCare provider.</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>The Bidder provided a detailed response based on their current processes to coordinate atypical services.</li> </ul>
<ul style="list-style-type: none"> <li>The Bidder states they provide services in accordance with the plan of care, and that follow up is done with the SCA, as needed.</li> </ul>
<ul style="list-style-type: none"> <li>A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>The Bidder described their current process of accepting referrals from SCAs and their working relationship with them.</li> </ul>
<ul style="list-style-type: none"> <li>A detailed response is provided.</li> </ul>
<ul style="list-style-type: none"> <li>The Bidder expressed an understanding of this requirement.</li> <li>The Bidder indicates experience with addressing limited providers/choices in some parts of Maine.</li> </ul>
<ul style="list-style-type: none"> <li>The Bidder states an intent to meet this requirement.</li> </ul>
<ul style="list-style-type: none"> <li>A detailed response is provided.</li> <li>The Bidder expressed knowledge of licensing in Maine.</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> <li>The Bidder indicates use of Management Information System.</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>
<b>C. Appeals, Complaints and Violation Process</b>
<ul style="list-style-type: none"> <li>Response refers to current process for addressing appeals/hearings.</li> </ul>
<ul style="list-style-type: none"> <li>Met requirement</li> </ul>

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<ul style="list-style-type: none"> <li>• Met requirement</li> </ul>
<ul style="list-style-type: none"> <li>• Met requirement</li> </ul>
<ul style="list-style-type: none"> <li>• A detailed response is provided, indicating the Bidder's plan and intent to meet this requirement.</li> </ul>
<b>D. MaineCare Claims</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided based on current process as contracted service provider.</li> </ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided based on current process as contracted service provider.</li> <li>• The Bidder uses WellSky and SwiftPage ACT.</li> </ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"> <li>• Met requirement.</li> <li>• The Bidder included an example of a consumer satisfaction survey.</li> </ul>
<b>G. Reports</b>
<ul style="list-style-type: none"> <li>• A detailed response is provided.</li> <li>• The Bidder acknowledges and intent to comply with requirement.</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Met requirement.</li> <li>• Subcontractors/consultants will not be used.</li> <li>• Met requirement.</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>• Met requirement.</li> </ul>
<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"> <li>• \$109.51 PM/PM</li> <li>• Cost based on current experience and projections (referral volume, staffing and other costs)</li> <li>• Bidder arrives at an annual cost of \$471,769 to perform work</li> <li>• Q. Cost varies by service type</li> </ul>

**STATE OF MAINE  
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**BIDDER NAME:** SeniorsPlus

**DATE:** 06-18-2024

**EVALUATOR NAME:** Esther Miller

**EVALUATOR DEPARTMENT:** DHHS – Office of Aging and Disability Services

\*\*\*\*\*

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**Individual Evaluator Comments:**

<b>Part I. Preliminary Information</b>
<b>Eligibility Requirements</b>
Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes: <b>a. Appendix C (Attestation Statement)</b>  Entities submitting a bid under this RFP may not be a provider of the underlying Atypical and specialized services being coordinated and billed under this RFP.
<ul style="list-style-type: none"> <li>• Provided Attestation Statement</li> </ul>
<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• Submitted</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• Submitted</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Submitted</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• Submitted, none.</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• Submitted, met requirements</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Submitted</li> </ul>

**STATE OF MAINE  
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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• I have a clear understanding of bids and searches, but not billing.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder will outreach the client, but submission does not detail how they will ensure services commence.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder has a process in place, but response does not reference the 7 day requirement.</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meet standard, and suggests adding performance measures</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder is currently a MaineCare provider</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• I have a clear understanding of how the Bidder currently, and proposes in the future to, provide(s) services.</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder has a process in place to ensure services are within scope of POC</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard with clear understanding of how the network of providers is maintained.</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard, clearly supports member choice</li> </ul>
<ul style="list-style-type: none"> <li>• Uses secure email to accept referrals and references strong relationship with SCAs</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder works with the SCA to ensure services are appropriate and meet requirements</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder works to meet this standard currently and notes the difficulty in certain areas of the state for providing member choice. The Department is certainly aware of the challenges provided in rural areas. Bidder did not speak directly to how they overcome those challenges currently, and this would have been a good opportunity for them to do so.</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder ensures appropriate licensure and goes on to state they complete in-person site visits as needed. I think this is a significant positive for this Bidder.</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard and uses DHHS SharePoint for complaints, which seems like a positive.</li> </ul>
<b>C. Appeals, Complaints and Violation Process</b>

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\*\*\*\*\*

<ul style="list-style-type: none"> <li>• Bidder has experience with the administrative hearings process and with seeking resolution prior to a hearing</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard, has experience</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard, has experience</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<ul style="list-style-type: none"> <li>• Bidder has detailed process and experience meeting this need</li> </ul>
<b>D. MaineCare Claims</b>
<ul style="list-style-type: none"> <li>• Bidder provides detailed steps on completing the MC billing process, and I have confidence they can do this correctly.</li> </ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"> <li>• Bidder uses third-party technology solution as a management information system. They provide an illustrated example which is easy to understand.</li> </ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"> <li>• Meets standard and provides sample of an environmental modification survey</li> </ul>
<b>G. Reports</b>
<ul style="list-style-type: none"> <li>• Bidder briefly explains how each reporting measure will be completed</li> </ul>
<ul style="list-style-type: none"> <li>• Meets standard</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Provides Attachment 7; job descriptions are clear and detailed.</li> </ul>
<ul style="list-style-type: none"> <li>• Will not use any subcontractors for this project.</li> </ul>
<ul style="list-style-type: none"> <li>• Provides Attachment 8; staffing plan is clear and detailed, including specific individuals. They are prepared to take on this work.</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>• Provides attachment 9; the work plan is not super clear to me, but it does look like they are prepared to continue providing services without interruption.</li> </ul>

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"> <li>•</li> </ul>

**STATE OF MAINE  
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**BIDDER NAME:** SeniorsPlus

**DATE:** 6/18/24

**EVALUATOR NAME:** Alecia Swihart

**EVALUATOR DEPARTMENT:** DHHS OADS

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<ul style="list-style-type: none"> <li>• Bidder met the requirement</li> </ul>
<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• P- Experience aligns with RFP requirements</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• No subcontractors identified</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Organizational chart provided</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• No litigation pending</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• P- Provided independent report</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• Met requirement</li> </ul>

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**EVALUATOR NAME:** Alecia Swihart

**EVALUATOR DEPARTMENT:** DHHS OADS

\*\*\*\*\*

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• P- Outlines provision of functions</li> <li>• P- Explanation of member support</li> <li>• P- Outlines standard of three days response to ASP invoice</li> <li>• P- Willing to attend meetings as required</li> <li>• P- Outlined survey process</li> <li>• P- Current enrollment</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• P- Detailed coordination for all services</li> <li>• P- Outlined process for assurance</li> <li>• P- Have 95 current ASPs in network</li> <li>• P- Outlined agreement processes</li> <li>• Outlined process to ensure choice and maintain costs within limits</li> <li>• Reflects coordination with SCAs with process for communication</li> <li>• Q- Uncertain whether arrangement occurs with Service Coordination Agency vs directly requesting eval</li> <li>• P- Response includes circumstances in which exception may be requested</li> <li>• P- Meets 48 hour requirement</li> <li>• P- Knowledge of required standards</li> <li>• P- Identified who will inspect work completed</li> <li>• Outlined process to ensure compliance and staff involved</li> <li>• P- Has documentation system in place</li> <li>• Response meets RFP requirements</li> </ul>
<b>C. Appeals, Complaints and Violation Process</b>
<ul style="list-style-type: none"> <li>• P- Addressed process for review and completion of report</li> <li>• Identified examples of supporting documentation</li> <li>• P- Included example of preparation</li> <li>• Acknowledged potential for corrective action</li> <li>• Q- Did not address monitoring and reporting compliance; spoke to clarification of compliance</li> <li>• P- Addressed complaint process</li> </ul>
<b>D. MaineCare Claims</b>
<ul style="list-style-type: none"> <li>• P- Outlined claim submission process</li> </ul>

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<b>E. Information Management</b>
<ul style="list-style-type: none"><li>• P- Outlined platform and process</li></ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"><li>• P- Provided survey</li></ul>
<b>G. Reports</b>
<ul style="list-style-type: none"><li>• Outlined use of current platforms to meet performance measures</li><li>• Outlined plan for ensuring report submission</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Attachment provided</li><li>• No subcontractors identified</li><li>• Q- Uncertain whether Specialized Services Coordinator is same as Referral Coordinator</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• P- Work plan represents continuation of services without gaps</li></ul>
<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"><li>•</li></ul>



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402038

**RFP TITLE:** Fiscal Agent for Atypical Services

**BIDDER NAME:** SeniorsPlus

**DATE:** 5/21/2024

**EVALUATOR NAME:** Allison Toomey

**EVALUATOR DEPARTMENT:** DHHS-OADS

\*\*\*\*\*

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

\*\*\*\*\*

**Individual Evaluator Comments:**

<b>Part I. Preliminary Information</b>
<b>Eligibility Requirements</b>
Bidders must provide documentation to demonstrate meeting eligibility requirements stated in PART I, C. of the RFP. This documentation includes: <div style="margin-left: 40px;"> <b>a. Appendix C</b> (Attestation Statement)         </div> Entities submitting a bid under this RFP may not be a provider of the underlying Atypical and specialized services being coordinated and billed under this RFP.
<ul style="list-style-type: none"> <li>• met</li> </ul>

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"> <li>• P- current vendor of FAAS for 28 years</li> <li>• P- experience in target population from a variety of business models (AAA, Care Coordination, FMS, and FAAS).</li> <li>• P- In-State offices</li> <li>• P- relevant experience examples.</li> </ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"> <li>• met</li> </ul>

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Part IV, Section III Proposed Services
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. General Requirements</b>
<ul style="list-style-type: none"> <li>• I- participated in home shows to increase contractor network.</li> <li>• P- has an established network of providers.</li> <li>• N- did not indicate how provider bids are obtained.</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<ul style="list-style-type: none"> <li>• P- will notify ASPs in 3 days when invoices have errors.</li> <li>• Q- why would an ASP be contacted to research MaineCare denials?</li> </ul>
<ul style="list-style-type: none"> <li>• Met.</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> <li>• P- currently enrolled with MaineCare.</li> </ul>
<b>B. Atypical Services Requirements</b>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• P- 95 current ASPs</li> <li>• Met expectations</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• Q- is the bidder arranging for evaluation or is it the bidder's expectation the SCA coordinate this? Unsure if this meets RFP expectation.</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> <li>• Bidder expressed understanding of state requirements.</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<b>C. Appeals, Complaints and Violation Process</b>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>

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<ul style="list-style-type: none"> <li>• met</li> </ul>
<b>D. MaineCare Claims</b>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<b>E. Information Management</b>
<ul style="list-style-type: none"> <li>• P- information system provides batch reports which can be uploaded to MIHMS</li> <li>• P- Client profile in Wellsky for documentation of correspondence, etc,</li> </ul>
<b>F. Performance Measures</b>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<b>G. Reports</b>
<ul style="list-style-type: none"> <li>• Q- the bidder has made a recommendation to condense reports in their proposal?</li> <li>• Q- did the bidder meet expectations in this section if they simply state they will do it or continue to do it? For example: "Open Referral Tracker – SeniorsPlus will continue utilizing current reporting processes using assessment date for reporting open referrals."</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Staff position titles and job descriptions are included and roles are clear.</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<ul style="list-style-type: none"> <li>• met</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>• Met</li> <li>• Project lead is identified in this area.</li> </ul>

<b>Part IV, Section IV. Cost Proposal and Budget Narrative</b>
<ul style="list-style-type: none"> <li>•</li> </ul>



STATE OF MAINE  
DEPARTMENT OF HEALTH AND HUMAN  
SERVICES

Janet T. Mills  
Governor

Jeanne M. Lambrew, Ph.D.  
Commissioner

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202402038**  
**RFP TITLE: Fiscal Agent for Atypical Services**

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

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

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

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

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

DocuSigned by:

*Heather Bingelis*

DE54F56CA62E041D...

**Signature**

May-21-2024

**Date**



STATE OF MAINE  
DEPARTMENT OF HEALTH AND HUMAN  
SERVICES

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Commissioner

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202402038**  
**RFP TITLE: Fiscal Agent for Atypical Services**

I, Doreen McDaniel 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.

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DocuSigned by:

*Doreen McDaniel*

F31CB46F139C43C...

Signature

May-21-2024

Date



STATE OF MAINE  
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SERVICES

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Governor

Jeanne M. Lambrew, Ph.D.  
Commissioner

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202402038**  
**RFP TITLE: Fiscal Agent for Atypical Services**

I, Esther Miller 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.

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DocuSigned by:

*Esther Miller*

35D7D97AA20A490...

**Signature**

May-21-2024

**Date**



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

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Governor**

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Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202402038  
RFP TITLE: Fiscal Agent for Atypical Services**

I, Alecia Swihart 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.

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DocuSigned by:

*Alecia Swihart*

42588245904CA7C...

**Signature**

May-21-2024

**Date**



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SERVICES**

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Governor**

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Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202402038  
RFP TITLE: Fiscal Agent for Atypical Services**

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

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DocuSigned by:

*Allison Toomey*

258979748202456...

**Signature**

May-21-2024

**Date**