

**State of Maine
Master Score Sheet**

RFP# 202311235					
Data and Survey Services for State TANF and ASPIRE-TANF Programs					
Bidder Name:		Arkansas Foundation for Medical Care, Inc.	Briljent, LLC	Market Decisions LLC, dba Market Decisions Research	MEF Associates
Proposed Cost:		\$189,272.75	\$308,927.50	\$96,468.98	\$525,297.00
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	30.00	18.00	18.00	22.00	25.00
Section III: Proposed Services	45.00	20.00	30.00	22.00	35.00
Section IV: Cost Proposal	25.00	12.74	7.81	25.00	4.59
TOTAL	<u>100.00</u>	<u>50.74</u>	<u>55.81</u>	<u>69.00</u>	<u>64.59</u>
Bidder Name:		Pan Atlantic Research	Partnerships for Health, LLC	Public Consulting Group LLC	Resultant LLC
Proposed Cost:		\$149,605.00	\$172,461.68	\$249,916.80	\$331,445.00
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	30.00	20.00	12.00	28.00	8.00
Section III: Proposed Services	45.00	17.00	16.00	40.00	15.00
Section IV: Cost Proposal	25.00	16.12	13.98	9.65	7.28
TOTAL	<u>100.00</u>	<u>53.12</u>	<u>41.98</u>	<u>77.65</u>	<u>30.28</u>

RFP# 202311235**Data and Survey Services for State TANF and ASPIRE-TANF Programs**

Bidder Name:		The MassINC Polling Group, Inc.	University of New England
Proposed Cost:		\$119,586.38	\$376,587.89
Scoring Sections	Points Available		
Section I: Preliminary Information	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	30.00	23.00	12.00
Section III: Proposed Services	45.00	27.00	25.00
Section IV: Cost Proposal	25.00	20.17	6.40
TOTAL	100.00	70.17	43.40

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
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# 202311235
Data and Survey Services for State TANF and ASPIRE-TANF Programs

I. Summary

Through RFP# 202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs, the Department sought proposals for services to assist the Department in promoting accountable public programs that reduce poverty, alleviate hardship, and increase sustainable employment for low-income families with children.

Ten Bidders responded to the RFP: Arkansas Foundation for Medical Care, Inc., Brilljent, LLC, Market Decisions LLC, DBA Market Decisions Research, MEF Associates, Pan Atlantic Research, Partnerships For Health, LLC, Public Consulting Group LLC, Resultant LLC, The MassINC Polling Group, Inc., and University of New England

Through the evaluation process, Public Consulting Group LLC was the highest scoring Bidder and determined to provide the best value to the State of Maine.

II. Evaluation Process

An Evaluation Team, composed of five State employees and one consultant, applied the consensus method in scoring the Bidders' Qualifications & Experience, and Proposed Services. Scores for the Cost Proposal were assigned using a mathematical formula.

III. Qualifications & Experience of Public Consulting Group LLC

Provided a well-rounded, experience-laden portfolio, reflecting a strong background in conducting focus groups and public policy surveys designed to reach and assess hard-to-reach populations.

IV. Proposed Services by Public Consulting Group LLC

Provided a comprehensive response outlining a clear understanding of and ability to meet programmatic expectations outlined in the RFP and demonstrated the means and skills necessary to meet the RFP's performance requirements.

V. Cost Proposal

Public Consulting Group LLC provided an initial-period-of-performance cost of \$249,916.80.

VI. Conclusion

Out of 100 possible points, the Evaluation Team awarded Public Consulting Group LLC a score of 77.65. The strengths of the Public Consulting Group LLC proposal outweighed the other bidders through both its qualification and experience and the services it proposed. The Evaluation Team has determined the proposal submitted by Public Consulting Group LLC represents the best value to the State of Maine.

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Mar-22-2024

Via Electronic Mail: ngere@une.edu

University of New England
Nicholas Gere, Director of Research Administration
11 Hills Beach Road
Biddeford, ME 04005

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Nicholas Gere,

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 for Family Independence. 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:

- Public Consulting Group LLC

Public Consulting Group LLC received the evaluation team's highest ranking. The Department will be contacting Public Consulting Group LLC 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 Public Consulting Group LLC. Public Consulting Group LLC 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:

64F41AB634DB44F...

Ian Yaffe
Director
Office for Family Independence

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Mar-22-2024

Via Electronic Mail: SBD@afmc.org

Arkansas Foundation for Medical Care, Inc.
Debbie Rushing, Strategy and Business Development Manager
1020 West 4th Street, Suite 400
Little Rock, AR 72201

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Debbie Rushing,

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 for Family Independence. 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:

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
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Mar-22-2024

Via Electronic Mail: cmcgarry@briljent.com

Briljent, LLC
Celia McGarry
7615 West Jefferson Boulevard
Fort Wayne, IN 46804

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Celia McGarry,

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 for Family Independence. 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:

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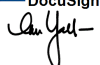
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Mar-22-2024

Via Electronic Mail: pmadden@marketdecisions.com

Market Decisions LLC, dba Market Decisions Research
Patrick Madden, President
511 Congress Street, Suite 801
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Patrick Madden,

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 for Family Independence. 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:

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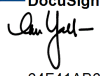
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Sincerely,

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Mar-22-2024

Via Electronic Mail: ladonna.pavetti@mefassociates.com

MEF Associates
LaDonna Pavetti
1330 Braddock Place, Suite 220
Alexandria, VA 22314

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear LaDonna Pavetti,

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 for Family Independence. 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:

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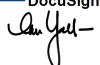
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Maine Department of Health and Human Services
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Augusta, Maine 04333-0011
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Mar-22-2024

Via Electronic Mail: jedes@panatlanticresearch.com

Pan Atlantic Research
Jason Edes, President
127 Fenway Street
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Jason Edes,

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 for Family Independence. 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:

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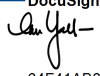
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Mar-22-2024

Via Electronic Mail: djoffe@pcgus.com

Public Consulting Group LLC
Deborah Joffe, Engagement Manager
148 State Street
Boston, MA 02109

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Deborah Joffe,

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 for Family Independence. 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:

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
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Mar-22-2024

Via Electronic Mail: Michelle.Mitchell@PartnershipsForHealth.org

Partnerships for Health, LLC
Michelle Mitchell, Executive Director
112 State Street
Augusta, ME 04330

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Michelle Mitchell,

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 for Family Independence. 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:

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
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TTY: Dial 711 (Maine Relay)

Mar-22-2024

Via Electronic Mail: blong@resultant.com

Resultant LLC
Brad Long
111 Monument Circle, Suite 202
Indianapolis, IN 46204

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Brad Long,

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 for Family Independence. 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:

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

Sincerely,

DocuSigned by:

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Director
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TTY: Dial 711 (Maine Relay)

Mar-22-2024

Via Electronic Mail: skoczela@massincpolling.com

The MassINC Polling Group, Inc.
Steve Koczela, President
11 Beacon Street, Suite 500
Boston, MA 02108

SUBJECT: Notice of Conditional Contract Award under RFP #202311235 Data and Survey Services for State TANF and ASPIRE-TANF Programs

Dear Steve Koczela,

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 for Family Independence. 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:

- Public Consulting Group LLC

Public Consulting Group LLC received the evaluation team's highest ranking. The Department will be contacting Public Consulting Group LLC 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 Public Consulting Group LLC. Public Consulting Group LLC 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:

64F41AB634DB44F...

Ian Yaffe
Director
Office for Family Independence

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Arkansas Foundation for Medical Care Inc.

DATE: January 30, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	18.00
Section III. Proposed Services	45.00	20.00
Section IV. Cost Proposal	25.00	12.74
<u>Total Points</u>	<u>100.00</u>	<u>50.74</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Arkansas Foundation for Medical Care Inc.

DATE: January 30, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Arkansas Foundation for Medical Care Inc.

DATE: January 30, 2024, and March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	18.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 50 years' experience, based in Arkansas with no indication of office in New England • 25 years' experience in data collection • Self-reports its proprietary, web-based survey administration tool is internationally recognized • Heavy healthcare and Medicaid focus • Offer 300 qualified individuals in various roles to collect and analyze data • Member of 14 Quality Improvement Organizations for CMS • Notes its survey successes with 200,000 respondents providing insight for more than 50 orgs • Holds certifications: NCQA, HEDIS, CAHPS • Three projects provided, with none having a TANF link
2. Subcontractors
<ul style="list-style-type: none"> • None indicated
3. Organizational Chart
<ul style="list-style-type: none"> • Provided, but project team not indicated
4. Litigation
<ul style="list-style-type: none"> • One indicated, not related to contract performance
5. Financial Viability
<ul style="list-style-type: none"> • Provided three years of audited financials
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided with no professional liability but with umbrella liability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Arkansas Foundation for Medical Care Inc.

DATE: January 30, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	20.00

Evaluation Team Comments: Bidder’s response reveals a lack of understanding of barriers experienced by the TANF population within Maine and relies heavily on the Department’s participation in scope execution.

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Conducts business in multiple time zones • Utilizes the REDCap (Research Electronic Data Capture) tool for data collections, which is HIPAA compliant • Acknowledged adherence to reading level requirement via writing assistive programs; did not explain what assistive programs will be used to evaluate writing levels
B. Communication
<ul style="list-style-type: none"> • Met requirements
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed survey instrument will be available in Spanish. Evaluation Team notes that Spanish is not in the top five languages spoken in Maine • Appears to misinterpret “Availability of interpretation and translation services” as a survey topic • Did not address including childcare and transportation as survey topics • Proposed a “turnkey” approach to survey architecture, which may not address the unique requirements of survey participants in Maine • Minimally responsive to ensure the survey methodology includes a representative sample of TANF and ASPIRE-TANF Participants, not offering an understanding of State’s current TANF-population size or distribution • Did not propose a process for contacting non-native English speakers or language learners • Did not propose a process for non-English-speakers to ask for interpretation services • Acknowledged confidentiality requirement, noting it would limit access to databases and encrypted servers

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Arkansas Foundation for Medical Care Inc.

DATE: January 30, 2024, and March 11, 2024

<ul style="list-style-type: none">• Did not address procedure for confidentially processing paper responses
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none">• Proposed emphasis on graphic presentation, use of dashboards, and providing context
E. Representative Group
<ul style="list-style-type: none">• Response relies on Department for identification of Participants to be recruited to serve as volunteers of the Representative Group• Did not address logistics of possible in-person meetings• Acknowledged providing professional administrative support to the Representative Group. However, approach is not aligned with Department's anticipated outcome (awarded Bidder will not write the report for Representative Group)
F. Reports
<ul style="list-style-type: none">• Met requirements
2. Staffing
<ul style="list-style-type: none">• Staffing Plan appears to support the proposed level of effort, however, this level of effort relies heavily on the Department's participation in scope execution
3. Implementation - Work Plan
<ul style="list-style-type: none">• Work Plan appears to support the proposed level of effort; however, this level of effort relies heavily on the Department's participation in scope execution

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Arkansas Foundation for Medical Care Inc.

DATE: January 30, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$189,272.75	x	25.00 points	=	12.74

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Brilljent LLC

DATE: January 30, 2024, February 14, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	18.00
Section III. Proposed Services	45.00	30.00
Section IV. Cost Proposal	25.00	7.81
<u>Total Points</u>	<u>100.00</u>	<u>55.81</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Brilljent LLC

DATE: January 30, 2024, February 14, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Brilljent LLC

DATE: January 30, 2024, February 14, 2024, and March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	18.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Headquarters in Fort Wayne IN • In business since 1998 with emphasis on health care • Heavy background in data analysis and survey administration • Experience focused on Health IT projects • Experience with state and Federal policy • Processes start with seeking information and input through research • Provided three projects, though none TANF-related • Projects focused on organization performance rather than participant-level data
2. Subcontractors
<ul style="list-style-type: none"> • One indicated, providing advanced data analytics specific to healthcare
3. Organizational Chart
<ul style="list-style-type: none"> • Provided with project team indicated
4. Litigation
<ul style="list-style-type: none"> • None indicated
5. Financial Viability
<ul style="list-style-type: none"> • Provided three years of audited financials • Appear financially viable, but documents reveal majority of revenue comes from a single client
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, noting professional liability coverage

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Brilljent LLC

DATE: January 30, 2024, February 14, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	30.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met requirements
B. Communication
<ul style="list-style-type: none"> • Proposed using Project Management Book of Knowledge as methodology • Process Includes stakeholder input and client feedback • Addressed internal communication but not external
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Addressed all requirements in detail, with research cited and appropriately footnoted • Response specific to TANF and its associated administrative barriers • Response reflected keen interest in learning about TANF population and its contingent make-up • Proposed leveraging the Department’s existing translation and interpretation resources • Seems to have misinterpreted “<i>Availability of interpretation and translation services</i>” and “<i>Experiences of discrimination based on racial or ethnic identity, sex, gender identity, sexual orientation, ability or disability status, religion, national origin, or marital status</i>” as a service to provide rather than a survey topic • Acknowledged preapproval requirement and offered a detailed description of the proposed survey methodology • Acknowledged representative sample requirement and offered a description of a proposed methodology • Did not acknowledge 2024 or biannual requirement • Did not offer process for contacting non-native English speakers • Did not offer process for non-English speakers to request interpretation services • Acknowledged confidentiality requirement, but did not offer details on how it would ensure this requirement
D. Data Collection, Analysis, and Reporting

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Brilljent LLC

DATE: January 30, 2024, February 14, 2024, and March 11, 2024

- Proposed providing data in editable format
- Proposed providing both qualitative and quantitative data
- Unclear if data sharing/analysis includes the complete scope of data analysis
- Unclear if draft of legislative report, per 22 M.R.S.A. § 3109(3), will include complete scope of data analysis

E. Representative Group

- Proposed an “on boarding” process for Representative Group
- Provided five-step process to identify and recruit participants
- Will consult with Department following stakeholder analysis and identifying potential participants
- Proposed in-person and virtual meetings, though virtual meetings may not capture a full TANF population sample
- Proposed a high-level governance framework to ensure activities align with goals
- Approach highlights impact of Representative Group
- Offered a detailed description of active group administration
- Proposed coaching members on effective communication techniques

F. Reports

- Met requirements

2. Staffing

- A support staff function is noted in Attachment 7 but not shown in Organization Chart. It is not apparent how this function supports project
- Did not include support staff

3. Implementation - Work Plan

- Offered a detailed narrative plan (not in timeline chart) with specific dates for task completion
- Did not note specific tasks delegated to subcontractor

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Brilljent LLC

DATE: January 30, 2024, February 14, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$308,927.50	x	25.00 points	=	7.81

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Market Decisions LLC, dba Market Decisions Research

DATE: February 14, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	22.00
Section III. Proposed Services	45.00	22.00
Section IV. Cost Proposal	25.00	25.00
<u>Total Points</u>	<u>100.00</u>	<u>69.00</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Market Decisions LLC, dba Market Decisions Research

DATE: February 14, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Market Decisions LLC, dba Market Decisions Research

DATE: February 14, 2024, and March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	22.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Based in Portland, in business nearly 25 years • Performs 100,000 surveys and 75 projects per year in 35 states • Focused group facilitators trained at RIVA Institute • Previous and current provider to the Department (OBH) for evaluation services • Provided three projects, one supporting OBH and two supporting vocational rehab programs in other states; all demonstrating knowledge of and experience with populations similar to those of TANF
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Provided but did not indicate project team
4. Litigation
<ul style="list-style-type: none"> • None indicated
5. Financial Viability
<ul style="list-style-type: none"> • Did not provide three years of audited financials
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, with professional liability noted

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Market Decisions LLC, dba Market Decisions Research

DATE: February 14, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	22.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Acknowledged requirement and proposed assigning a specific staff member to review material for appropriate reading level
B. Communication
<ul style="list-style-type: none"> • Proposed providing Department access to its survey software client monitoring portal • Proposed a one-day response to the Department
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed visual cues to aid in survey comprehension • Incorporates intelligent skip logic to answer only applicable questions • Proposed both open- and closed-ended questions • Proposed use of QR codes, which may be restrictive, considering subject population • Proposed task matrix outlining Department and vendor responsibilities • Did not address diversity of experience or self-selection bias • Noted racial equity and proposed over-sampling racial and ethnic minorities • Specified survey to be available in Spanish (not in Maine’s top five languages), but did not address how Maine’s other large linguistic communities will access survey • Response demonstrates a limited knowledge of survey population’s socioeconomic make up • Proposed sample sizes and a 95 percent goal in confidence interval, with a defined margin of error • Proposed follow up with nonrespondents via phone, text, and mail • Did not offer option to complete via paper survey • Proposed using a partner for handling calls, though did not specify a subcontractor in Part IV. Section II.2 Subcontractors • Proposed calling/texting at various times through the day/evening • Proposed administration process is HIPAA compliant

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Market Decisions LLC, dba Market Decisions Research

DATE: February 14, 2024, and March 11, 2024

- Proposed Voxco, which offers highest levels of data security
- Proposed use of Azure and SharePoint, both of which are Federally compliant

D. Data Collection, Analysis, and Reporting

- Data sharing/analysis does not include the complete scope of data analysis
- Did not address 2024 or biannual survey timing, due date of draft reports, data interpretation, or editing rights of or dissemination by the Department
- Did not include, per 22 M.R.S.A. § 3109(3), complete scope of data analysis in draft legislative report

E. Representative Group

- Response offered light support to Representative Group
- Offered detailed description of process to elicit input from group, sharing common goals, and clarifying amount of work

F. Reports

- Met requirements

2. Staffing

- Stated no subcontractors to be used, but refers to working with “partners” in Part IV, Section II.1 and Section III, Part II C.4 responses
- Survey interview/response team includes two bilingual members
- Staffing plan includes 1 named staff and 1 position neither of whom are included in Attachment 7

3. Implementation - Work Plan

- Provided at a high level but included specific dates for milestones
- Timeline for facilitating representative group seems unrealistic

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Market Decisions LLC, dba Market Decisions Research

DATE: February 14, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$96,468.98	x	25.00 points	=	25.00

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: MEF Associates

DATE: February 14, 2024, February 15, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	25.00
Section III. Proposed Services	45.00	35.00
Section IV. Cost Proposal	25.00	4.59
<u>Total Points</u>	<u>100.00</u>	<u>64.59</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: MEF Associates

DATE: February 14, 2024, February 15, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: MEF Associates

DATE: February 14, 2024, February 15, 2024, and March 11, 2024

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

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

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Founded in 2009 and headquartered in Alexandria VA • Noted experience working with TANF programs in other states • Noted experience working with projects having similar scope as RFP • Recently completed studies include: U.S. Department of Health and Human Services Administration for Children and Families, Understanding Poverty: Childhood and Family Experiences, and TANF Office Culture • Noted experience working with state legislatures • Provided three projects, all relevant to RFP
2. Subcontractors
<ul style="list-style-type: none"> • University of Southern Maine for survey services
3. Organizational Chart
<ul style="list-style-type: none"> • Provided, indicating project team
4. Litigation
<ul style="list-style-type: none"> • None indicated
5. Financial Viability
<ul style="list-style-type: none"> • Provided three years of non-audited financial statements
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, not noting professional liability but indicating umbrella coverage

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: MEF Associates

DATE: February 14, 2024, February 15, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	35.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met requirements
B. Communication
<ul style="list-style-type: none"> • Proposed to meet bi-weekly, initially, with monthly meetings and weekly updates following survey approval • Proposed entire staff to execute nondisclosure agreements
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed survey design takes into account specific TANF population by noting that only the first half of the survey is expected to be completed by Non-ASPIRE participants • Proposed a dedicated Equitable Evaluation Workgroup to review survey for equity concerns • Proposed sampling approximately 50 percent of the current TANF population to ensure a decent margin of error and overall response rate • Response reflects familiarization with current number of Maine TANF cases • Provided estimates of response rates based on ethnicity and proposed over-sampling minority groups with fewer respondents, specifically mentioning non-English speakers • Estimate BIPOC and/or non-English speakers aligns with ACF data for Maine from 2020 • Proposed \$20 incentive for respondents and six follow up calls • Staffing available to administer survey orally (telephone) only in English • Proposed supporting multiple languages, including Spanish and Arabic, French, Portuguese, Somali (four of State’s top five languages) • Proposed sending survey invitations in all languages noted • Proposed cloud storage is FedRAMP compliant

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: MEF Associates

DATE: February 14, 2024, February 15, 2024, and March 11, 2024

<ul style="list-style-type: none"> • Offered advanced security measures (HIPAA Compliant) through a Business Associate Agreement at a cost of \$5,000, annually. (Not included in cost proposal) • HIPAA compliance for the survey to be obtained through Qualtrics
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Proposed entire staff to execute confidentiality agreements • Proposed a detailed timeline and adding additional staff during data analysis • Did not address the Department retaining all editing rights and approval of content, publication, and disseminating final reports • Budgeted for in-person representation, if desired, as part of presentation to the Joint Standing Committee
E. Representative Group
<ul style="list-style-type: none"> • Engagement with members to be a continuous, iterative process and inclusive through all stages of research • Proposed a strategy to empower focus group members with ownership of effort • Proposed activities of the Representative Group include an unrealistic timeline, activities that are outside the scope of the Group's mandate, and onerous responsibilities • Noted high cost of transportation in Maine as a barrier to in-person meetings
F. Reports
<ul style="list-style-type: none"> • Met requirements
2. Staffing
<ul style="list-style-type: none"> • Included an Equitable Evaluation Consultant not indicated in Organization Chart • Included Manpower temps that are not noted as sub-contractor or sub-sub-contractor
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Did not address tasks and positions responsible • Did not note tasks delegated to subcontractor

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: MEF Associates

DATE: February 14, 2024, February 15, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$525,297.00	x	25.00 points	=	4.59

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Pan Atlantic Research

DATE: February 15, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	20.00
Section III. Proposed Services	45.00	17.00
Section IV. Cost Proposal	25.00	16.12
<u>Total Points</u>	<u>100.00</u>	<u>53.12</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Pan Atlantic Research

DATE: February 15, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Pan Atlantic Research

DATE: February 15, 2024, and March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	20.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • In business since 1985 and located in Portland • Experience working with vulnerable populations in Maine • Currently supporting (Maine Integrated Youth Health Survey) project for MCDC • States completed “dozens” of projects similar to RFP, including ten parent surveys, eight integrated health service surveys, three homeless youth risk surveys, and more than 20 survey and focus groups (including one for the Finance Authority of Maine) • Provided three projects, all relevant to RFP, with one supporting the Department and another the Aroostook Agency on Aging
2. Subcontractors
<ul style="list-style-type: none"> • Voxco (located in Montreal) • Maine Language Connect (Experience working with low income and immigrant populations and has significant strength in reaching non-English speaking population)
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirements
4. Litigation
<ul style="list-style-type: none"> • None indicated
5. Financial Viability
<ul style="list-style-type: none"> • Provided incomplete tax returns and financial information
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, not indicating professional liability coverage

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Pan Atlantic Research

DATE: February 15, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	17.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met requirements
B. Communication
<ul style="list-style-type: none"> • Met requirements
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed a question review process with stakeholders • Proposed use of a TANF steering committee for input • Proposed basing survey on goals of program participants rather than Federal performance metrics. This indicates an understanding of project goals • VOXCO to administer survey online and in print • Proposed three options for completing survey, ensuring method accessibility • Did not address diversity of experience or self-selection bias • Proposed response target of 1,000 completed surveys, with 2.8% margin of sampling error • Proposed offering a \$15 Hannaford or Amazon gift card to the first 1,000 respondents • Proposed a tailored reminder to individual survey targets rather than a mass reminder • Survey translated, at a minimum, into Spanish and French, Portuguese, Arabic, and Somali (four of the five top languages in State) • Did not address administering the survey in 2024 or biannually thereafter • Initial survey outreach to be by mail, which will include a link to the survey using a unique household QR code • Proposed mailing brochures monthly • Frequency of phone outreach effort is not clearly defined • Proposed use of auto dialer for phone outreach • Follow-up outreach will be by SMS, phone, email, and mailings
D. Data Collection, Analysis, and Reporting

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Pan Atlantic Research

DATE: February 15, 2024, and March 11, 2024

- Proposed a password protected portal to transfer and store data
- Recognized need to obtain data from sources other than Department
- Data sharing/analysis does not include the complete scope of data analysis
- Did not address CY2024 or biannually thereafter, Department retaining editing rights, or Department approval of content before dissemination
- Did not include, per 22 M.R.S.A. § 3109(3), complete scope of data analysis in draft legislative report

E. Representative Group

- All participants who complete survey to be offered chance to join Representative Group, with no more than 20 participants selected
- Proposed paying each participant \$125 per 90-minute group session
- Offered in-person, online, or in-person/online hybrid format
- Proposed providing infrastructure, such as loaning computers, hosting and sharing drafts, and graphics support
- Suggested incorporating irrelevant Federal legislative proposals

F. Reports

- Met requirements

2. Staffing

- Field Administrators noted but not indicated on Organization Chart
- Noted position of Senior Programmer for supporting online surveys for in-school distribution and troubleshooting school administration issues, neither of which are associated with scope of RFP
- For subcontractors, included Voxco positions but not Maine Language Connect position
- Proposed weekly meetings
- A total of six members of project team: Three from Bidder, two from VOXCO, and one from Maine Language Connect. Appears staffing plan will not support survey volume, convening Representative Group, or generating legislative report
- Did not provide time allocations

3. Implementation - Work Plan

- Provided a plan entitled “2023 MIYHS Work Plan” with “TANF” entries scattered throughout
- Did not provide a timeline chart
- Task execution delineated by quarter and year
- Noted which tasks are delegated to subcontractors

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Pan Atlantic Research

DATE: February 15, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$149,605.00	x	25.00 points	=	16.12

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Partnerships for Health, LLC

DATE: February 15, 2024, February 26, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	12.00
Section III. Proposed Services	45.00	16.00
Section IV. Cost Proposal	25.00	13.98
<u>Total Points</u>	<u>100.00</u>	<u>41.98</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Partnerships for Health, LLC

DATE: February 15, 2024, February 26, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Partnerships for Health, LLC

DATE: February 15, 2024, February 26, 2024, and March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	12.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Founded in 2020, located in Maine • Offers mission driven consulting services in the public health arena • Full-service evaluation agency with 97 evaluation contracts covering 138 evaluation projects, none pertaining to TANF • Partners with clients to facilitate data driven decisions • Current Department provider supporting MCDC • Three projects provided, all relevant to RFP, demonstrating experience with various evaluation methodologies but not pertaining to TANF
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Provided but did not indicate project team
4. Litigation
<ul style="list-style-type: none"> • None indicated
5. Financial Viability
<ul style="list-style-type: none"> • Three years of audited financials not included and information provided did not offer clarity as to financial viability
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, indicating professional liability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Partnerships for Health, LLC

DATE: February 15, 2024, February 26, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	16.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Proposed review of reading materials by external health literacy expert to review materials in Arabic, Somali, French, and Spanish for cultural/linguistic appropriateness • Noted experience and compliance with MaineIT policies • Offered a six-month period for providing master copies
B. Communication
<ul style="list-style-type: none"> • Did not address meeting with the Department • Executive Director named as primary point of contact for all communications with Department • Proposed maintaining Smartsheet online workplan for Department to track progress • Offered a two-week period for providing meeting minutes • Acknowledged including the Department in communications but did not acknowledge requirement of obtaining Department approval prior to releasing external communications
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed partially outsourcing survey development to a workgroup • Preliminary research demonstrated a lack of balance in selecting source material and a failure to review original legislation and policy • Proposed including review by University of Southern Maine’s Office of Research Social Science Institutional Review Board • Did not address diversity of experience or self-selection bias • Offered paper (within Department offices) and on-line options • Offered raffle, gift card, and eyeglasses incentives • Survey plan did not ensure survey respondents are target audience • Proposed leveraging the State’s interpretation services for languages beyond Arabic, English, French, Spanish, and Somali

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Partnerships for Health, LLC

DATE: February 15, 2024, February 26, 2024, and March 11, 2024

<ul style="list-style-type: none">• Did not address biannual requirement
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none">• Proposal content reflects review of original Economic and Family Security Report
E. Representative Group
<ul style="list-style-type: none">• Proposed convening Representative Group before Evaluation Workgroup so participants can be involved in both, though timeline for this seems unrealistic• Proposed soliciting participation in Representative Group from entire eligible population through Group's application process• Proposed honorarium, though did not specify amount or source of funding• All meetings virtual• Proposing to expand scope of Representative Group activities beyond RFP and legislative intent, to the possible detriment of Group's responsibilities
F. Reports
<ul style="list-style-type: none">• Met requirements
2. Staffing
<ul style="list-style-type: none">• Did not include time allocations
3. Implementation - Work Plan
<ul style="list-style-type: none">• Noted use of a consultant, which is not specified elsewhere in proposal• Included separate sections for convening the Representative Group, the survey, and the legislative Report

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Partnerships for Health, LLC

DATE: February 15, 2024, February 26, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$172,461.68	x	25.00 points	=	13.98

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Public Consulting Group LLC

DATE: March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	28.00
Section III. Proposed Services	45.00	40.00
Section IV. Cost Proposal	25.00	9.65
<u>Total Points</u>	<u>100.00</u>	<u>77.65</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Public Consulting Group LLC

DATE: March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Public Consulting Group LLC

DATE: March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	28.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Founded in 1986 • Headquarters in Boston • Extensive experience with TANF, having supported 25+ states with this program • Extensive Maine TANF experience, supporting a variety of Department efforts • Providing support to Department for nearly two decades • Provided three projects, all related to the RFP • For Colorado project, demonstrated experience surveying TANF recipients to measure outcomes and program satisfaction
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Provided
4. Litigation
<ul style="list-style-type: none"> • Multiple reported, with none associated with contract performance
5. Financial Viability
<ul style="list-style-type: none"> • Provided three years of audited financials
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, indicating professional liability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Public Consulting Group LLC

DATE: March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	40.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met requirements
B. Communication
<ul style="list-style-type: none"> • Provided a detailed project management (initiation, planning, execution, monitoring, closing) approach for scheduling • Offered a communication plan, but did not acknowledge preapproval requirement
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Referred to legislation requiring survey and report • Proposed a core set of questions for all and a second set of questions for ASPIRE-TANF population • Noted experience in service gap assessments and trauma-informed interviewing • Demonstrated familiarity/knowledge of the TANF population in Maine • Proposed a random sampling on four factors – exemption status, program status, household type, and geographic location • Proposed sampling at the Department’s District Office level • Offered to oversample low population groups • Proposed to sample monthly to represent low population groups • Will use random sampling, weighting, and incentives • Acknowledged the geographic diversity of the Maine TANF participant make-up • Effort will be made to ensure that a wide swath of “intersectional identities” are represented • Multi-modal - Print, online, and verbal options proposed • Proposed administering survey, initially, in English, French, and Spanish, then meeting other language requirements (Portuguese, Lingala, Somali) through use of State’s translation and interpretation services • Qualtrics to be used as the survey instrument • Noted use of HIPAA compliant process • Will utilize a SOC2 compliant storage platform

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Public Consulting Group LLC

DATE: March 11, 2024

D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none">• Provided a detailed process plan• Will scrub all personally identifiable information from responses• Response demonstrates an understanding that the survey and legislative-required report are separate items• Proposed semi-annual presentations to stakeholders selected by Department• Proposed District Office Fact Sheets to complement the biannual reports
E. Representative Group
<ul style="list-style-type: none">• Proposed coordinating with Department's ASPIRE vendor• Proposed incentives• Proposed a small group (10-15) of individuals from different backgrounds, experiences, and geographic locations
F. Reports
<ul style="list-style-type: none">• Met requirements
2. Staffing
<ul style="list-style-type: none">• Total time allocated (0.67 FTE) appears insufficient relative to project proposal
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met requirements

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Public Consulting Group LLC

DATE: March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$249,916.80	x	25.00 points	=	9.65

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Resultant LLC

DATE: February 27, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	8.00
Section III. Proposed Services	45.00	15.00
Section IV. Cost Proposal	25.00	7.28
<u>Total Points</u>	<u>100.00</u>	<u>30.28</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Resultant LLC

DATE: February 27, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Resultant LLC

DATE: February 27, 2024, and March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	8.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Began in 2008 as KSM, became Resultant in 2021 • Headquartered in Indianapolis • No indication of TANF or survey experience • Provided three projects, demonstrating data analysis but no TANF or survey administration experience
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Did not indicate where project team fits into enterprise organization
4. Litigation
<ul style="list-style-type: none"> • None indicated
5. Financial Viability
<ul style="list-style-type: none"> • Not provided, noting financials available upon NDA
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, not noting professional liability but indicating general liability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Resultant LLC

DATE: February 27, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	15.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Proposed using Qualtrics • Noted use of the Flesch-Kincaid Grade Level to evaluate grade level scale/score for survey through integration with Microsoft Office • Provided process for survey related material (Qualtrics) but not other materials
B. Communication
<ul style="list-style-type: none"> • Met requirements
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed developing Governance Steering Committee, whose members would include representatives from State Department of Labor and Bureau of Revenue Service, and an Advisory Board, both of which have no stake in survey or its results • Noted availability of interpretation and translation services but did not offer detail on what languages may be covered/included • Offered a “design thinking approach” diagram • Proposed including Representative Group in survey development • Did not address review or approval by Department or providing substantial description of proposed process • Noted requirement of survey methodology, but did not offer process on how to accomplish • Noted heavy reliance on Qualtrics • Did not acknowledge 2024, biannual, or multi-mode requirements • Did not offer method(s) for addressing language accommodations requirement
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Proposed data sharing agreement • Did not acknowledge 2024, biannual, or data interpretation requirement
E. Representative Group

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Resultant LLC

DATE: February 27, 2024, and March 11, 2024

- Proposed working with Representative Group to add its report to the Department's report. The Group's report is intended to be an independent product

F. Reports

- Proposed weekly timeline

2. Staffing

- Offered four-member project team
- Did not include minimum qualifications
- Appears staffing plan will not meet demands of this project (see Staffing, part a. comment)
- Did not indicate tasks to administer survey, oversee focus group, or compile formal report

3. Implementation - Work Plan

- Plan addresses only survey portion of project
- Did not indicate position/person responsible for each task

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: Resultant LLC

DATE: February 27, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$331,445.00	x	25.00 points	=	7.28

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: The MassINC Polling Group, Inc.

DATE: February 27, 2024, and March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	23.00
Section III. Proposed Services	45.00	27.00
Section IV. Cost Proposal	25.00	20.17
<u>Total Points</u>	<u>100.00</u>	<u>70.17</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: The MassINC Polling Group, Inc.

DATE: February 27, 2024, and March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: The MassINC Polling Group, Inc.

DATE: February 27, 2024, and March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	23.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Established in 2010 • Headquarters in Massachusetts • Specializes in public policy surveys and focus groups for hard-to-reach populations • Provided three projects, though none noted TANF-specific experience, all are related to the mechanical aspects of RFP requirements
2. Subcontractors
<ul style="list-style-type: none"> • Metropolitan Research Services (field services) • Recycled Paper Printing (paper products)
3. Organizational Chart
<ul style="list-style-type: none"> • Provided, unclear if entire organization is project team
4. Litigation
<ul style="list-style-type: none"> • None indicated
5. Financial Viability
<ul style="list-style-type: none"> • Provided 990 Tax return for 2020 and 2021 and audited statements provided for 2022 for parent organization (The Massachusetts Institute for a New Commonwealth, Inc d/b/a The MassINC Polling Group, Inc.) • Offered The MassINC Polling Group, Inc.-specific financials upon request, though documents will be reviewed but not audited
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, not indicating professional liability but noting umbrella liability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: The MassINC Polling Group, Inc.

DATE: February 27, 2024, and March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	27.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met requirements
B. Communication
<ul style="list-style-type: none"> • Met requirements
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed relying on previous survey(s), though expectation of RFP is for new, original survey effort • Offered opportunity for multiple rounds of feedback and revisions • Offered review of existing data sources within the overview of the Proposed Services • Did not address diversity of experience • Offered a five percent margin of error and 95 percent confidence level • Proposed checking for self-selection bias with follow up phone interviews • From Bidder’s Complimentary Information, Offered multiple modes of contact and incentives within the overview of the Proposed Services • Did not address 2024 or biannual requirement • Did not address reasonable accommodation for non-English speakers • Proposed assigning unique ID codes to obfuscate the responses
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • From overview of the Proposed Services: <ul style="list-style-type: none"> ➤ Noted experience analyzing large data sets in a variety of software tools, including Excel Pivot Tables, Microsoft BI, and Tableau ➤ Offered data presentable using conventional report formats such as Word, Excel, PowerPoint, or Google tools ➤ Proposed reviewing analyses of prior data for trends and continuity • Did not address 2024 or biannual requirement
E. Representative Group
<ul style="list-style-type: none"> • Proposed using survey as a way to develop/build focus group

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: The MassINC Polling Group, Inc.

DATE: February 27, 2024, and March 11, 2024

- Proposed creating and scheduling meetings and agendas
- Recommended \$100 incentive for those who participate
- Did not acknowledge providing support to Representative Group if it elects to present report to the Joint Standing Committee
- From overview of the Proposed Services:
 - Offered well thought-out strategy for group continuance
 - Viewed group as hybrid of qualitative research and focus group
 - Demonstrated understanding that Representative Group is to draw its own conclusion(s)

F. Reports

- Met requirements

2. Staffing

- Did not include minimum qualifications
- Did not indicate methodology for oversight or management of subcontractors
- Did not provide time allocation instead referenced Appendix G – Budget Form
- Appendix G – Budget Form provides 0.27 FTE allocated for entire scope of work

3. Implementation - Work Plan

- Provided a robust and detailed timeline, reflecting in-depth knowledge of survey development, execution, and analysis

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: The MassINC Polling Group, Inc.

DATE: February 27, 2024, and March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$119,586.38	x	25.00 points	=	20.17

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: University of New England

DATE: March 11, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Shannon Courtois, Rainald Gervais, Timothy Sturtevant, Julian Baer, April Richmond, and Melanie Messina

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	12.00
Section III. Proposed Services	45.00	25.00
Section IV. Cost Proposal	25.00	6.40
<u>Total Points</u>	<u>100.00</u>	<u>43.40</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: University of New England

DATE: March 11, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: University of New England

DATE: March 11, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30.00	12.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Maine-based • No specific TANF experience noted • Decades of experience conducting research involving data collection and analysis • Supports Department in a variety of projects • The Department issued a cure letter in 2023 that followed decision to terminate contract • Provided three projects all related to conducting surveys
2. Subcontractors
<ul style="list-style-type: none"> • One for interpretation services
3. Organizational Chart
<ul style="list-style-type: none"> • Provided
4. Litigation
<ul style="list-style-type: none"> • Provided with none related to contract performance
5. Financial Viability
<ul style="list-style-type: none"> • Provided three years of audited financials
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, though not noting professional liability

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: University of New England

DATE: March 11, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45.00	25.00

Evaluation Team Comments:

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Offered phone and email contact information for project team • Proposed use of Flesch-Kincaid Reading Level assessment tool
B. Communication
<ul style="list-style-type: none"> • Will request written approval prior to releasing external communication
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed using REDCap data collection software • Proposed use of branching logic to make experience as positive and efficient as possible, skipping questions that the logic indicates as not applicable to design survey that takes less than 20 minutes to complete • Subcontractor to support language translation/interpretation • REDCap surveys can be administered as Web-based, phone-based, or printed • Will initiate survey by sending post cards with QR Code • Surveys will be sent in alternative language or formats if Department records include information about literacy barriers • Survey administrator to complete, within past 48 months, the CITI online training module on Human Subjects' Protection • Will seek ethical review and determination by its Institutional Review Board to meet core confidentiality component • Data will be de-identified, but method wasn't provided • Recommended a \$10 incentive gift card (not applicable in this section)
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Offered different visualization approaches to tell the story of Maine's program data • Will prepare key talking points and provide canned responses • Will provide slides or other visual depictions of key aspects of the reports • Proposed practice/work sessions prior to formal presentation and a debriefing following presentation with the goal of improving report presentations

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: University of New England

DATE: March 11, 2024

E. Representative Group
<ul style="list-style-type: none">• Will select a random sample to ensure perception of unbiased recruitment• Will create an oversampling with backup invitees• Will query Group through web-based questionnaires to determine meeting logistics• Proposed QR code as primary driver in recruitment• Proposal focused on meeting logistics, with sparse response to recruitment methodology• Proposal focused on having the group report on the data, not their experiences and how that relates to the data• Proposed mini sessions to brief on what to expect if presenting to legislature: space layout, roles, process, and procedure and to practice presentations
F. Reports
<ul style="list-style-type: none">• Met requirements
2. Staffing
<ul style="list-style-type: none">• Grant Fiscal Manager will work with subcontractor staff to ensure procurement and payment policies/procedures are followed• Proposed staffing level, 1.4 FTE spread among four team members appears insufficient for services proposed
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met requirements

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER: University of New England

DATE: March 11, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$96,468.98	÷	\$376,587.89	x	25.00 points	=	6.40

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • N - medically focused
2. Subcontractors	<ul style="list-style-type: none"> • None
3. Organizational Chart	<ul style="list-style-type: none"> • P - Clear
4. Litigation	<ul style="list-style-type: none"> • Interesting
5. Financial Viability	<ul style="list-style-type: none"> • Bidder met the requirements
6. Certificate of Insurance	<ul style="list-style-type: none"> • Bidder met the requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Bidder met the requirements • N – Didn't cite Eastern
<ul style="list-style-type: none"> • P- Redcap • IT - Bidder met the requirements • 6/8 Grade - Bidder met the requirements
<ul style="list-style-type: none"> • Nothing overly positive or negative in this section • Bidder met the requirements
B. Communication
<ul style="list-style-type: none"> • Bidder met the requirements • Nothing overly positive or negative in this section • I – specified "verbal discussion"
<ul style="list-style-type: none"> • Bidder met requirements • Bidder met requirements
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • N- Turnkey, Spanish • Not impressed with this response at all
<ul style="list-style-type: none"> • Bidder checked the box, no details • Not impressed – how are they going to do what is asked?
<ul style="list-style-type: none"> • N- Oral only for LEP, folks have to call in • HIPAA compliant
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • 200K/80, only 2500 per. • P - NH
<ul style="list-style-type: none"> • Nothing overly positive or negative in this section - Undwerwhelming • P – NH example
E. Representative Group
<ul style="list-style-type: none"> • N- Dept level of work "Warm hand off" • N- Dept level of work "Warm hand off" • P – trained in community engagement
<ul style="list-style-type: none"> • N- happy to do what's asked • N- response lacks substance • P – responsive to wishes of group
F. Reports

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• Bidder met Requirements
<ul style="list-style-type: none">• Bidder met Requirements
2. Staffing
<ul style="list-style-type: none">• N – healthcare focused
<ul style="list-style-type: none">• None
<ul style="list-style-type: none">• Bidder met Requirements
3. Implementation - Work Plan
<ul style="list-style-type: none">• Turnkey

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 01/26/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • I – 300 staff including healthcare related survey analysts • I – 50 Year History in healthcare related fields. • I – 25 years of survey administration projects • I - Medicaid agency focused on managed care and fee-for-service industries. • P – Internationally recognized, web-based survey administration tool. • I – 3 projects provided, health focused.
2. Subcontractors	<ul style="list-style-type: none"> • None stated
3. Organizational Chart	<ul style="list-style-type: none"> • Provided – Unclear who is on project team – could be those in blue but includes 2 Data Science Managers and Supervisors. • Names are not disclosed for all positions.
4. Litigation	<ul style="list-style-type: none"> • Provided – 1 lawsuit involving a staff memeber
5. Financial Viability	<ul style="list-style-type: none"> • Provided – Appears financially viable
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided, Expires 8/1/24, Umbrella Liability of \$3m.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 01/26/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Provided – Will adhere to the Department’s operating hours
<ul style="list-style-type: none"> • I – Research Electronic Data Capture (REDCap) tool • P – HIPAA Compliant • I – Acknowledges adherence to MaineIT Policies. • P – Department can choose a branded URL or generic REDCap link for survey. • I – Electronic survey via emailed link or paper version. • I – Acknowledges adherence to reading level requirement via writing assistive programs.
<ul style="list-style-type: none"> • I – Acknowledges adherence to requirement • P – Department’s active approval on development of survey materials and communications.
<ul style="list-style-type: none"> • I – Acknowledges adherence to Department ownership of all materials.
B. Communication
<ul style="list-style-type: none"> • I – AMFC will schedule and adhere to a specific strategy for communication • P – Thorough plan outlined
<ul style="list-style-type: none"> • P – Monthly contract administration meetings • P – Ensure transparency during the survey administration.
<ul style="list-style-type: none"> • N – Available for in-person meetings “with approved travel”.
<ul style="list-style-type: none"> • I – Acknowledges adherence to requirement • I – Acknowledges adherence to requirement
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Certified Consumer Assessment of Healthcare Providers and Systems (CAHPS) • I – accessible for persons with average or limited English proficiency. • I – Available in Spanish upon request • P – Dedicated bilingual staff for customer support. • N – Did not see mention of childcare and transportation being included in the survey.
<ul style="list-style-type: none"> • P – Quality Assurance Plan (QAP) for survey administration and provides this requirement.
<ul style="list-style-type: none"> • I – Acknowledged adherence to requirements. • N – Did not specifically state former participants terminated in prior year.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 01/26/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none"> • P – Survey provided in Online, Print, and Oral format. • Q – Where do printed surveys get returned?
<ul style="list-style-type: none"> • P – No PII will be collected • P – REDCap system is housed and managed with AFMC IT Team.
<p>D. Data Collection, Analysis, and Reporting</p>
<ul style="list-style-type: none"> • I – Have developed over 80 surveys with over 200,000 survey respondents. • I – National Committee of Quality Assurance (NCQA) • I – Healthcare Effectiveness Data and Information Set (HEDIS) • P – will develop specifications so only necessary information is received from the Department. • N – Uses “a solution” to share confidential information – Does not specify what that solution is.
<ul style="list-style-type: none"> • I- Inferential analysis regarding economic security and basic needs • I – Will identify gaps between benefit resources and obstacles participants face • P – Data analysis plan developed within 1st month of contract award.
<ul style="list-style-type: none"> • P – Have developed several interactive dashboards for other survey projects; local, statewide, and national data • I – Have presented their findings at various State and National conferences.
<p>E. Representative Group</p>
<ul style="list-style-type: none"> • I – Contact potential recruits through a “warm hand-off” from Department • P- Prior experience with forming focus or representative groups.
<ul style="list-style-type: none"> • I – 10 Years experience w/ coalition and focus group kickoffs • I – Staff in Community member engagement and project management • P – Provide recording to participants not able to attend kick off meeting • I – AFMC’s role is facilitator once kick off is completed.
<ul style="list-style-type: none"> • I – Will provide survey data in a separate format with anonymity. • I – Acknowledged assisting group per RFP requirement
<p>F. Reports</p>
<ul style="list-style-type: none"> • Will work with Department to develop reporting plan • Will work with Department to develop reporting templates and timelines
<p>2. Staffing</p>
<ul style="list-style-type: none"> • Q - Healthcare Data Scientist III and Specialist Healthcare Evaluations positions appear to be on different “team” than Senior Healthcare Data Scientist and Bilingual Specialist, Healthcare Evaluations positions on org chart. • I – Attachment 7 provided and complete
<ul style="list-style-type: none"> • I – Project will be all in-house; no subcontractors.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 01/26/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

- I – Attachment 8 provided and complete
- Q – Time allocation for each position is less than 3 months each in initial period of performance of 21 months; .88 FTE

3. Implementation - Work Plan

- I – Attachment 9 provided and complete.

Part IV, Section IV. Cost Proposal

- I – Provided
- I – Indirect of \$3.02 per hour for Telephone/Computer software and licensing fees.
- I – Reflects proposed staffing, Travel for 3, and costs for 5700 surveys.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 22-Jan-2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – Office for Family Independence
– Department of Health and Human Services – State of Maine

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Requirement met.
2. Subcontractors
<ul style="list-style-type: none"> • None mentioned.
3. Organizational Chart
<ul style="list-style-type: none"> • Unsure if there will be an assigned team specifically for this report or if efforts will be split.
4. Litigation
<ul style="list-style-type: none"> • No concern.
5. Financial Viability
<ul style="list-style-type: none"> • No concerns
6. Certificate of Insurance
<ul style="list-style-type: none"> • Requirement met.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 22-Jan-2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – Office for Family Independence
– Department of Health and Human Services – State of Maine

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Requirement met. Proposal indicates that AFMC conducts business in multiple time zones although, it doesn't specify if after hours assistance is also available.
<ul style="list-style-type: none"> Utilize REDCAap (Research Electronic Data Capture) tool for data collections which is HIPAA compliant.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
B. Communication
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Vendor confirms that they will meet this requirement.
<ul style="list-style-type: none"> Requirement met
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> Mentioned survey instrument will also be available in Spanish. For immigrant populations, Spanish isn't consistently in the top 5 languages spoken.
<ul style="list-style-type: none"> No concerns.
<ul style="list-style-type: none"> No concerns.
<ul style="list-style-type: none"> Need to ensure that the survey response are not primarily via email as that may limit a portion of the TANF population. May be easier to coordinate with FEDCAP offices.
<ul style="list-style-type: none"> Requirement met.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none">
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> No concerns.
E. Representative Group
<ul style="list-style-type: none"> Plan exists and meets requirements.
<ul style="list-style-type: none"> Requirement met but I'm curious how they will convene the group of low income households from disparate parts of the state. Vendor is located in Arkansas which may hinder any F2F meetings if found to be needed.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 22-Jan-2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – Office for Family Independence
– Department of Health and Human Services – State of Maine

<ul style="list-style-type: none">• 3A requirements are met; although, I do not feel that the provided response adequately answers 3B
F. Reports
<ul style="list-style-type: none">• Requirement met.
<ul style="list-style-type: none">• Requirement met.
2. Staffing
<ul style="list-style-type: none">• No concerns. Staffing plan is more than adequate.
<ul style="list-style-type: none">• Exceeds requirements.
<ul style="list-style-type: none">• Exceeds requirements.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Comprehensive plan provided that is well detailed. This bodes well as this is exactly the type of work that we are looking for on the backend.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1-26-2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Group

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• 25 years of experience in data collection• 50 year history in healthcare related fields• NCQA certified
2. Subcontractors
<ul style="list-style-type: none">• None listed
3. Organizational Chart
<ul style="list-style-type: none">• Provided full org chart
4. Litigation
<ul style="list-style-type: none">• One listed from 2021.
5. Financial Viability
<ul style="list-style-type: none">• Appear financially viable
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1-26-2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Group

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • They can meet this request- are available in multiple time zones including eastern.
<ul style="list-style-type: none"> • They will use REDCap platform for secure, HIPAA compliant. • Can access via smart phone • They can also provide a paper version if necessary • Will verify reading levels with SOM employees- will provide documentation/surveys ahead of time for signoff.
<ul style="list-style-type: none"> • Will provide all materials to SOM digitally.
<ul style="list-style-type: none"> • All materials and deliverables are the SOM property and can be used /reused at any point.
B. Communication
<ul style="list-style-type: none"> • Will establish a mutually acceptable communication plan.
<ul style="list-style-type: none"> • Listed in detail about scheduling meetings.
<ul style="list-style-type: none"> • Will use all necessary communication avenues to serve SOM needs.
<ul style="list-style-type: none"> • Team is experienced professionals and will provide timely responses to client requests. • Will meet 3 days deadline for correspondence.
<ul style="list-style-type: none"> • Any external communication they will seek SOM approval. • Kick off meeting will confirm understanding of internal and external stakeholders.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • AFMC is certified as a Consumer Assessment of healthcare provider and systems survey vendor. • Will consult with SOM regarding any type of identified barriers. • Have bilingual staff for customer support. • AFMC has a QAP for survey administration
<ul style="list-style-type: none"> • They will provide this based on a 95% confidence level
<ul style="list-style-type: none"> • Will provide an advanced notification of survey • Will provide survey via multiple modes to ensure participation
<ul style="list-style-type: none"> • AFMC uses REDCap for secure authentication, data logging • Supports HIPAA compliance • No PII will be collected using their data collection tool
D. Data Collection, Analysis, and Reporting

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1-26-2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Group

<ul style="list-style-type: none"> • AFMC will develop a technically driven work plan for data sharing • Straight forward and secure
<ul style="list-style-type: none"> • AFMC will work with SOM to assist with interpreting data, identifying gaps. • Draft reports will be provided by December 1, 2024
<ul style="list-style-type: none"> • Will provide their data science team to produce a clear and compelling presentation. • Will also develop several interactive dashboards.
E. Representative Group
<ul style="list-style-type: none"> • Will work with SOM to identify potential recruits
<ul style="list-style-type: none"> • Over 10 years experience providing kick off meetings • Will assign trained staff who work in community member engagement
<ul style="list-style-type: none"> • Will provide administrative support and provide survey data in a separate format if required • Will be responsive to the group and assist with their feedback
F. Reports
<ul style="list-style-type: none"> • They will track data collection and work closely with SOM to develop a reporting plan.
<ul style="list-style-type: none"> • AFMC Project staff will work with Som to develop time lines and reporting templates.
2. Staffing
<ul style="list-style-type: none"> • Provided in attachment 7
<ul style="list-style-type: none"> • N/A – no subcontractors are used
<ul style="list-style-type: none"> • Staff has been selected, the full staffing plan was provided in Attachment 8. • Time Allocation is included.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Complete work plan is shown in Attachment 9.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1/25/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Appendix A was completed with all requested data. • Appendix B was completed and signed. • Appendix C Statement of qualifications included a lot of detail. Overview was detailed. <ul style="list-style-type: none"> ○ 300 qualified individuals in various roles needed to collect and analyze data ○ 50 years of experience ○ Member of 14 QIO for CMS ○ 200K respondents providing insight for over 50 orgs. ○ Holds certifications: NCQA, HEDIS, CAHPS • Appendix C Description of Projects in last 5 yrs. <ul style="list-style-type: none"> ▪ IPRO 11/2022 to present OH Dept of Medicaid. Included call monitoring, data collection, survey data in a QA roles to identify potential service gaps. Data collection and compilation. ▪ State of NH online and paper surveys for CDC collection of health behaviors among youth. Health trends monitoring to help improve adolescent health. ▪ AK epidemiological outcomes workgroup for substance abuse. Deliverables were infographics, databooks, videos, datasheets and bookmarks. Provided reporting to inform policy.
2. Subcontractors
<ul style="list-style-type: none"> • No subcontractors
3. Organizational Chart
<ul style="list-style-type: none"> • Organization chart provided – Executive staff not populated with named resources, but workgroup fully broken out by role with names and no vacancies notes.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1/25/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

4. Litigation
<ul style="list-style-type: none">Employee battery case denied by company. Settled 5500. HR issue not related completing tasks in scope of the RFP and fulfills request for litigation data.
5. Financial Viability
<ul style="list-style-type: none">Financial statement which included Independent auditor report provided for 2023, 2022, and 2021 by Landmark PLC CPA's. Appear viable and sound. No deficiencies in internal controls noted during the audit. Purpose is not to provide opinion of effectiveness of internal controls.
6. Certificate of Insurance
<ul style="list-style-type: none">Cincinnati Ins.Co and Traveler Casualty policies cited. Commercial General Claim, no Auto liability, Umbrella Liability, no workers comp, Managed Care Errors and Omissions included.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1/25/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor will meet the requirement.
<ul style="list-style-type: none"> • Tool names provided for data collection. Indicated accessibility and security. Vendor stated they would comply with all policies cited and provide reference material for the tool/user group. • 6th grade reading level confirmed and will comply with the guidelines and exceptions as requested.
<ul style="list-style-type: none"> • Vendor detailed submission methods that will comply with the RFP. • Vendor stated they will comply with the requirement and all materials delivered are the property of the department to reuse in the future.
B. Communication
<ul style="list-style-type: none"> • Vendor states compliance to request and assured consistent and transparent communication with meeting, documentation, meeting methods and document deliverables • Virtual kickoff after execution to confirm all deliverables, contract invoice and payable meetings, all reports and documents will be provided to the dept. for review, edits and final approval. • Vendor will comply with this requirement and elaborated on the items like agendas, schedules, status updates, follow up requests, scripts and presentations for approvals. • Vendor stated they will comply with this requirement. Team stands ready and available to address Dept. • Vendor will comply with this requirement. Any external communication would be after dept. approval.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • CAHPS certified survey vendor. Work with the Dept. for cultural sensitivity, transparency and accessible content for LEP, social diversity using a variety of methods. • Offered collaboration to overcome administrative burdens, language barriers. • Surveys will be anonymous and offered in Spanish upon request. • Tollfree hot line offered for translation requirements • Dept will have all access to materials and ability to edit in the master copy. • Living QA Plan. This will include all the details requested by the dept for review and approval.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1/25/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • Ideal random sample size will be based on several factor to achieve 95% confidence level with a 5% margin of error. Proposed survey methodology will be shared with the Dept for approval.
<ul style="list-style-type: none"> • Vendor will comply. Advance notice of the survey will be provided with instructions how to respond online, printed or by phone to include in an initial and biannual submission cycle.
<ul style="list-style-type: none"> • Vendor assures confidentiality and data protection of PII with a suite of tools that supports HIPAA compliance. • Product is managed by AFMC's IT team only; no other access permitted.
<p>D. Data Collection, Analysis, and Reporting</p>
<ul style="list-style-type: none"> • Vendor provided details how this will be accomplished to share confidential information securely with limited access. The solution was not named.
<ul style="list-style-type: none"> • Vendor complies to the requirements in the response and described how band timely delivery of reports per cited schedule.
<ul style="list-style-type: none"> • Vendor will assist with compelling presentation of data collected with dashboards with current customized data point in an easy to follow format for data informed decisions.
<p>E. Representative Group</p>
<ul style="list-style-type: none"> • Vendor provided prior project samples to assure a solid focus representative group and will coordinate with the Department to complete this task.
<ul style="list-style-type: none"> • Identified participants will have warm handoff from Dept to AFMC • Trained pro's are on staff to accomplish this task. • Process was provided in overview.
<ul style="list-style-type: none"> • Complies with this requirement. Described methodology and processes and provided prior successful initiatives in this section.
<p>F. Reports</p>
<ul style="list-style-type: none"> • Vendor will comply with report submission requirements. Quarterly reports will be submitted within 15 days after the end of the quarter.
<ul style="list-style-type: none"> • Vendor agrees to submission schedule.
<p>2. Staffing</p>
<ul style="list-style-type: none"> • Positions listed. Included in org. chart.
<ul style="list-style-type: none"> • No contractors
<ul style="list-style-type: none"> • Staffing plan included and complies with RFP request.
<p>3. Implementation - Work Plan</p>
<ul style="list-style-type: none"> • Plan included and appears to comply with the requirements • Included named resources for each task group/activity.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1/16/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: DHHS OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Out of state, large organization• Not-for-profit• P – Experience surveying public program recipients
2. Subcontractors
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• Met requirements
4. Litigation
<ul style="list-style-type: none">• One assault case settled
5. Financial Viability
<ul style="list-style-type: none">• Received
6. Certificate of Insurance
<ul style="list-style-type: none">• Received

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Arkansas Foundation for Medical Care, Inc.

DATE: 1/16/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: DHHS OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • REDCap currently used by some third parties in other Department programs for data and evaluation of contracts • P – Can complete survey on their phones • I – Possible unique web link • Q – Unclear how access to survey link is gated to exclude non-participants • Q – What assistive programs are used to evaluate writing level? Who is the subject matter expert?
<ul style="list-style-type: none"> • I – Exhaustive list of possible reports
<ul style="list-style-type: none"> • Meets requirement.
B. Communication
<ul style="list-style-type: none"> • Meets requirement.
<ul style="list-style-type: none"> • I – Suggesting monthly meetings to review invoice activity
<ul style="list-style-type: none"> • Meets requirements.
<ul style="list-style-type: none"> • Meets requirements.
<ul style="list-style-type: none"> • Meets requirements.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I - CAHPS is federally funded survey to evaluate healthcare services • Q – Unclear if “dedicated toll-free survey helpline” is in-house (sounds like it?) and which languages may be covered • Little light on details, copy-pasted language from RFP • Note – bullet 2 is a misinterpretation of the RFP item C.1.b, which is asking that a question be included in the survey about ASPIRE-TANF participants’ access to interpretation services
<ul style="list-style-type: none"> • P - Assuming will model new QAP on current ‘master’ QAP
<ul style="list-style-type: none"> • The TANF population size is publicly available data • N – Little light on clues about intended survey methodology
<ul style="list-style-type: none"> • I - Clear process for initial stages of contacting participants • N – No process for contacting non-native English speakers or ELLs, unclear how a non-English-speaker could call to ask for interpretation
<ul style="list-style-type: none"> •
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 1/16/2024

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EVALUATOR DEPARTMENT: DHHS OFI

<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Emphasis on graphic presentation • What's "nationally recognized" mean • Great example of similar work
E. Representative Group
<ul style="list-style-type: none"> • Good previous examples of similar work
<ul style="list-style-type: none"> • I - Would need to discuss process of warm handoff, may not be possible or beneficial in all instances, but generally I appreciate • P – Description of facilitation activity seems to align with Department's priorities • N – Unclear is someone is available to facilitate in person in Maine, if group participants elect for in-person meetings for themselves
<ul style="list-style-type: none"> • Q – Creation of the report is beyond the scope of services
F. Reports
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
2. Staffing
<ul style="list-style-type: none"> • P – Full team
<ul style="list-style-type: none"> • No subs
<ul style="list-style-type: none"> • 1,834 hours
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Thorough

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Briljent, LLC

DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • P – Good experience • N- Medical focused
2. Subcontractors	<ul style="list-style-type: none"> • Bidder met Requirements
3. Organizational Chart	<ul style="list-style-type: none"> • Bidder met Requirements
4. Litigation	<ul style="list-style-type: none"> • None
5. Financial Viability	<ul style="list-style-type: none"> • Bidder met Requirements
6. Certificate of Insurance	<ul style="list-style-type: none"> • Bidder met Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Briljent, LLC

DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Whose Local? • P – Detail on how to make accessible • Bidder met Requirements • Bidder met Requirements
B. Communication
<ul style="list-style-type: none"> • P – outline, two in-person mtgs • P – Very detailed • P – VT feedback • P – Clear and concise a priority • Bidder met Requirements • N – may not have fully understood provision
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • P – very detailed, well-thought out, specific to this project • P – Robust response • P – Detailed response • I – over-sampling • P – includes oral • Bidder met Requirements
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • P – both qualitative and quantitative • Bidder met Requirements • Bidder met Requirements
E. Representative Group
<ul style="list-style-type: none"> • P – Took responsibility, on-boarding • P – very organized approach • P and N – Coaching, support, too much?
F. Reports
<ul style="list-style-type: none"> • Bidder met Requirements • Bidder met Requirements
2. Staffing
<ul style="list-style-type: none"> • Bidder met Requirements • Bidder met Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

<ul style="list-style-type: none">• Detailed
3. Implementation - Work Plan
<ul style="list-style-type: none">• P - Very detailed, timeline

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Briljent, LLC

DATE: 01/27/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • P – Represent the Department with compassionate and empathetic professionals. • I – Experience in government and social service environments. • I – Experience with state and federal policy • I – Use of sensitive, inclusive, and supportive language in outreach activities. • I – Founded in 1998, 25 year history • I – Previous experience focused on Health IT projects • I – Provided 3 projects; Project 1 – Community workgroup, Project 2 & 3 – Surveys; Projects focused more on organization performance and not participant level data.
2. Subcontractors
<ul style="list-style-type: none"> • I – Laurel Health Advisors – advanced data analytics to optimize healthcare delivery
3. Organizational Chart
<ul style="list-style-type: none"> • I – Provided, subcontracted staff not identified.
4. Litigation
<ul style="list-style-type: none"> • I – None Stated, Financial Statements indicate “various legal matters arise” and “disposition of these matters will not have a material adverse affect”.
5. Financial Viability
<ul style="list-style-type: none"> • I – Provided, Appear viable • I – One customer accounted for 44%, 40%, and 31% of total revenue in '20, '21, and '22 respectively.
6. Certificate of Insurance
<ul style="list-style-type: none"> • I – Provided, Expires 7/1/2024, Professional Liability of \$5m.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Briljent, LLC

DATE: 01/27/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements.
<ul style="list-style-type: none"> • I – Acknowledged adherence to MaineIT Policies. • I – Acknowledged adherence to 6th grade reading level. • N – No mention of 8th grade reading level.
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements. • I – no proprietary or custom-coded content.
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements.
B. Communication
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements. • I – Will recommend a meeting cadence
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements. • I – Will provide project charter/work plan within 1 month of contract.
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements.
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements.
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements. • I – Speaks to a review of materials and deliverables. Does not speak to communications with individuals, organizations, or community stakeholders.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Begin with research to craft precise, impactful questions. • I – Leveraging the Department’s existing translation and interpretation resources. • I – Tailor questions for participants to feel safe in sharing experiences of discrimination • I – Provided thorough responses to all RFP criteria.
<ul style="list-style-type: none"> • I – people-centric approach • I – Identify data needs for effective and efficient survey • I – Uses Qualtrics, an industry-standard survey tool • I – Survey is tested before issuance. • I – Nonresponsive bias analysis • I – Provided robust response acknowledging this RFP requirement.
<ul style="list-style-type: none"> • I – Provided detailed response explaining steps to be taken to address this RFP requirement. • I – The Dillman Method – to get high response rates from difficult subjects.

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none"> • I – Conduct a pilot test to identify and address any practical issues.
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<ul style="list-style-type: none"> • I – Individual interview, group discussion, online surveys • I – Did not address CY24 and biannual thereafter.

<ul style="list-style-type: none"> • I – Data encryption, access control, and Anonymization
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D. Data Collection, Analysis, and Reporting
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<ul style="list-style-type: none"> • I – Provided process, including gaining approval from the Department.

<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement

<ul style="list-style-type: none"> • I – State they will closely coordinate with the Department, but does not specifically mention 2025 and biannually thereafter.

E. Representative Group

<ul style="list-style-type: none"> • I – Provided 5 step process to identify and recruit participants. • I – Will consult with the Department after identifying potential participants through their stakeholder analysis.
--

<ul style="list-style-type: none"> • I – High level governance framework to ensure activities align with goals. • I – In person and virtual meetings.

<ul style="list-style-type: none"> • I – Provided thorough response to provide administrative support • I – Will assist group in aligning report with Department’s requirements. • I – Will coach members on effective communication techniques.

F. Reports

<ul style="list-style-type: none"> • I – Acknowledge adherence to this RFP requirement.
--

<ul style="list-style-type: none"> • I – Acknowledge adherence to this RFP requirement.
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2. Staffing

<ul style="list-style-type: none"> • I – Attachment 7 provided • I – Project Manager currently oversees “several critical projects”. • N – Support staff not included in Organizational Chart
--

<ul style="list-style-type: none"> • Subcontracted with Jason C. Goldwater to provide data analytics expertise. • Subcontractor identified as Laurel Health Advisors in Appendix D.

<ul style="list-style-type: none"> • I – Attachment 8 provided

3. Implementation - Work Plan

<ul style="list-style-type: none"> • I – Attachment 9 provided

<ul style="list-style-type: none"> • I – Use of subcontractor noted, but not for specific tasks.

Part IV, Section IV. Cost Proposal

<ul style="list-style-type: none"> • I – Provided
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<ul style="list-style-type: none"> • I – Does not include cost for translation or interpreter services. Assumes this will be provided by the Department.

<ul style="list-style-type: none"> • I – Includes travel for two on-site visits w/ Department or Representative Group
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**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Briljent, LLC

DATE: 01/27/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

- | |
|---|
| <ul style="list-style-type: none">• I – Assumes the Department will receive paper surveys, convert them to pdf, and transmit them electronically to Briljent. |
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RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Brilljent, LLC

DATE: 19-JAN-2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI – DHHS - ME

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• No concerns.
2. Subcontractors
<ul style="list-style-type: none">• A single subcontractor is listed – No concerns.
3. Organizational Chart
<ul style="list-style-type: none">• Requirement met.
4. Litigation
<ul style="list-style-type: none">• No concerns
5. Financial Viability
<ul style="list-style-type: none">• No concerns
6. Certificate of Insurance
<ul style="list-style-type: none">• No concerns

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EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI – DHHS - ME

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
B. Communication
<ul style="list-style-type: none"> No concerns.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> Defer to team expert
<ul style="list-style-type: none"> Defer to team expert
<ul style="list-style-type: none"> Defer to team expert
<ul style="list-style-type: none"> Defer to team expert
<ul style="list-style-type: none"> Defer to team expert
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> No concerns. Page 76 mentions that “Briljent will develop and administer one (1) primary survey for TANF and ASPIRE-TANF participants” Unsure if this is period or per reporting period.
<ul style="list-style-type: none"> Requirements met.
<ul style="list-style-type: none"> No concerns noted – requirement met.
E. Representative Group
<ul style="list-style-type: none"> No concerns noted.
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> It’s important that the vendor take into account the low income nature of the program participants and how capable they may be to meet meeting requirements while fulfilling their other ASPIRE obligations. No immediate concern noted.
F. Reports
<ul style="list-style-type: none"> No method mentioned.
<ul style="list-style-type: none"> Requirement met
2. Staffing

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<ul style="list-style-type: none">• Team appears to already be in place. Requirement met.
<ul style="list-style-type: none">• Only subcontract is listed with the same oversight as the rest of the team.
<ul style="list-style-type: none">• N/a as team is already in place. Instead, a breakdown of each team member's history, education and accomplishments has been provided.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Schedule provided – no concerns

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RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Briljent, LLC

DATE: 1/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Founded in 1998 • Human aspect data collection not driven by technology
2. Subcontractors
<ul style="list-style-type: none"> • Laurel Health Advisors – also listed in their Org Qualifications as team members
3. Organizational Chart
<ul style="list-style-type: none"> • Provided one with top management and no names • Provided a project team org chart
4. Litigation
<ul style="list-style-type: none"> • None listed
5. Financial Viability
<ul style="list-style-type: none"> • They appear financially viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided

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BIDDER NAME: Briljent, LLC

DATE: 1/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • They are committed to meeting these hours of operation
<ul style="list-style-type: none"> • They accept the policies and will meet their requirements • They will provide documents at a 6th grade reading level, all materials provided to be approved by SOM first
<ul style="list-style-type: none"> • All materials created will be for the SOM exclusive use • Will provide a list of all deliverables, materials, data, etc.
B. Communication
<ul style="list-style-type: none"> • They will meet as requested • Provided a suggested meeting schedule
<ul style="list-style-type: none"> • They agree and will comply with this requirement • Provided a complete list for their approach for status meetings
<ul style="list-style-type: none"> • They agree and will be able to comply with this requirement • They agree and will be able to comply with this requirement
<ul style="list-style-type: none"> • They agree and comply • Will collaborate regularly
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Will develop a clear set of questions for participants • Language interpretation can be made available • Will tailor questions so participants feel safe and will share • Will craft and pose questions to meet these requirements • Will work with SOM to craft other questions to meet department needs
<ul style="list-style-type: none"> • People-centric approach • Early promotion of the survey • Listed how they will develop and run the survey
<ul style="list-style-type: none"> • They will define a focus group • Use relevant variables to ensure the sample diversity • Create a valid sample size • Create random sampling • Follow ethical standards • Conduct a pilot test
<ul style="list-style-type: none"> • They will use various modes of access including oral feedback • They use Data Encryption, Access Control and Anonymization
D. Data Collection, Analysis, and Reporting

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EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none"> • Will coordinate with the SOM to identify all the data requirements
<ul style="list-style-type: none"> • They will develop and meet required dates
<ul style="list-style-type: none"> • Will work closely with the SOM to help prepare and present reports to JSC.
E. Representative Group
<ul style="list-style-type: none"> • Will identify stakeholders, and create a profile.
<ul style="list-style-type: none"> • Will develop an approach highlighting their impact
<ul style="list-style-type: none"> • Will recruit individuals ready to contribute to the key role • Accurately reflect the needs and experiences • Will provide support for their framework, goals, responsibilities • Will provide comprehensive support if they wish to present their report to JSC
F. Reports
<ul style="list-style-type: none"> • Will track and record all necessary data
<ul style="list-style-type: none"> • Will ensure timely submission of all required reports
2. Staffing
<ul style="list-style-type: none"> • Included in Attachment 7 – as requested
<ul style="list-style-type: none"> • One subcontractor, lead by the PM
<ul style="list-style-type: none"> • A staffing plan was provided in attachment 8
3. Implementation - Work Plan
<ul style="list-style-type: none"> • A work plan has been included in attachment 9 • Only percents provided – not hours.

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RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Briljent, LLC

DATE: 1/26/2024

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Overview provided. Many prior state employees are current employees familiar with state and federal reporting requirements and policies. Lots of detail provided regarding current staff and proposed project resources. • Many State health agency products reviewed and providing in the proposal ifor similar initiatives. Founded in 1998. • Project details exceeded the number needed to meet the required of the proposal request.
2. Subcontractors	<ul style="list-style-type: none"> • Laurel Health Advantage for data analytics. Prior project engagements.
3. Organizational Chart	<ul style="list-style-type: none"> • Organization chart provided with names resources and positions. Extensive staff narrative with lots of detail highlighting experience for prior, similar projects.
4. Litigation	<ul style="list-style-type: none"> • No litigation
5. Financial Viability	<ul style="list-style-type: none"> • Three years of audited financial statements provided. Company appears viable to a non Financial SME reviewer.
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided. Brokers and issuing companies detailed. Policy details for each category requested. Companies, limits and types.

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BIDDER NAME: Briljent, LLC

DATE: 1/26/2024

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor states they will comply to requirement.
<ul style="list-style-type: none"> • Vendor acknowledges and accepts requirements and policies. No specific technology described.
<ul style="list-style-type: none"> • Vendor acknowledges and complies. Universal COTS authoring tools used. All materials created for DHHS exclusive use.
<ul style="list-style-type: none"> • Complete list of deliverable and all project artifacts will be provided to DHHS. Includes documents, source files, data, etc.
B. Communication
<ul style="list-style-type: none"> • Vendor states compliances and agrees to meet as requested. Anticipated schedule and types of meeting provided in overview format briefly addressing vendor and DHHS roles/tasks for meetings.
<ul style="list-style-type: none"> • Vendor agrees to comply and provided details for each kind of meeting in the list with resources responsible for attending and PMBOK approach applied to the process and requirements for each item noted above.
<ul style="list-style-type: none"> • Vendor complies with these requirements and indicated effective communication using any format desired by the Dept.
<ul style="list-style-type: none"> • Vendor agrees and will comply.
<ul style="list-style-type: none"> • Vendor agrees and will comply to make sure the Dept. needs are fully met.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Vendor organized a point by point response that addressed all of the requirements in detail with research cited appropriately footnoted in the document. • Addressed LEP needs and how to deliver to this need. • Leverage Dept. translation services to streamline translation requirements. C • Vendor provided the opportunity to ask about future support services that may also be needed. • Questions will be expertly crafted
<ul style="list-style-type: none"> • People centric approach • Passion to enhance healthcare systems and outcomes • Flexible, accommodating with various methods: paper, computer access, phone and provides options for language transaction. • Anonymous data collection • Surveys embedded in text requests.

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EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • Short, relevant with 10-15 minutes of effort. • Non response bias weighting and use multiple methods to address missing data for report generation. • Skilled in various analytical techniques • Software is use Qualtrics, MAXQDA, InVivo, Tableau, R/Python. These are commonly known products. Some are currently in use by DHHS and other data teams.
<ul style="list-style-type: none"> • Includes diverse and representative sample of in scope participants. • Vendor provided a description of ways to include typically underrepresented groups to analyze with a description of each approach that may be used to satisfy data collection/reporting requirements.
<ul style="list-style-type: none"> • Vendor agrees and will comply. • Oral participation is assured through a variety of ways to interact: group, individual interviews and only surveys.
<ul style="list-style-type: none"> • Vendor agrees and complies. • Confidentiality assured through encryption, limited access and anonymous data collection from respondents.
<p>D. Data Collection, Analysis, and Reporting</p>
<ul style="list-style-type: none"> • Vendor agrees and complies. • Suitable methods with be determined in collaboration with the Dept to ensure requirements are met.
<ul style="list-style-type: none"> • Vendor complies to the requirement and recurring schedule. All content will be in editable formants using standard tools for the Dept. use.
<ul style="list-style-type: none"> •
<p>E. Representative Group</p>
<ul style="list-style-type: none"> • Vendor will comply with this requirement.
<ul style="list-style-type: none"> • Vendor will complete and provided and detailed description how to successfully identify and recruit participants.
<ul style="list-style-type: none"> • The vendor will comply and provided details for each work items listed.
<p>F. Reports</p>
<ul style="list-style-type: none"> • Vendor will track and record all data to fulfill requirements. • Vendor complies requirement and will submit reports timely.
<p>2. Staffing</p>
<ul style="list-style-type: none"> • Job descriptions provided. • Staff descriptions provided in company overview with pictures staff.
<ul style="list-style-type: none"> • One sub identified. Jason C. Goldwater due to his specific knowledge and experience.

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EVALUATOR DEPARTMENT: MECDC/WIC

- Provided. Job descriptions, Staff assignments and duties and individual resumes were provided for all team member to support this effort.

3. Implementation - Work Plan

- Work plan was provide in a narrative format with detailed descriptions for each milestone with target dates. I would not say this met the timeline chart requirement, but the narrative was very in depth and complete.

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BIDDER NAME: Briljent, LLC

DATE: 1/23/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Staff with experience in gov service and program admin • Out-of-state • Human-centered language • Listed several similar projects with state governments for experience
2. Subcontractors	<ul style="list-style-type: none"> • One sub
3. Organizational Chart	<ul style="list-style-type: none"> • Met requirement
4. Litigation	<ul style="list-style-type: none"> • None listed
5. Financial Viability	<ul style="list-style-type: none"> • For-profit • Statements provided
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

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EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Q - Using unspecified software/program for reading level
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Meets requirements
B. Communication
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Acknowledged requirements
<ul style="list-style-type: none"> • Acknowledged requirements
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • P - Research common barriers ahead of time (“academic research”) • P - Demonstrated knowledge of administrative barriers • Q – Proposes to write survey questions from background research, will ensure no leading questions? • Misunderstood item b. • Misunderstood item c. • I - Department is source of information about educational programs • Good anticipation of supports • I – Suggesting different language for two surveys, one for past and one for present TANF recipients
<ul style="list-style-type: none"> • Good feedback included from previous project • Detailed implementation description • Survey provided primarily online and through text message • Using Qualtrics for online survey • Q - 20-ish questions for all survey respondents, 5 additional for participants interested in joining representative group – may be influenced by recruitment strategy for rep. group • P – Mentions avoiding leading questions • P – Proposes to include explanations for more personal questions • P – Proposes non-response bias analysis • Listed several softwares for survey and data analysis

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EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none"> Accounting for self-selection bias P - Proposes oversampling underrepresented groups
<ul style="list-style-type: none"> N – Unclear how non-native English-speakers will be informed of the survey
<ul style="list-style-type: none"> Meets requirement
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> Meets requirement Q – Unsure from description of they are clear on the need to collect and analyze <i>existing</i> Department/State program enrollment and outcome data from DHHS, DOL, etc.
<ul style="list-style-type: none"> Meets requirement
<ul style="list-style-type: none"> Acknowledged requirement
E. Representative Group
<ul style="list-style-type: none"> I – Recommends creating “individual profiles” for each member of rep. group to disseminate to their team Q – Suggested coordinating with Department to review rep. group members for approval, over-all tight control of who is included
<ul style="list-style-type: none"> I – Over-all heavy hand with representative group administration Will conduct ongoing analysis of groups effectiveness
<ul style="list-style-type: none"> Detailed description of very active administration Q – Proposes to prepare presentation for the group P – Proposes to coach members on effective communication techniques
F. Reports
<ul style="list-style-type: none"> Acknowledged requirement
<ul style="list-style-type: none"> Acknowledged requirement
2. Staffing
<ul style="list-style-type: none"> Provided
<ul style="list-style-type: none"> One contractor as data analyst
<ul style="list-style-type: none"> 2,808 hours (1.35FTE)
3. Implementation - Work Plan
<ul style="list-style-type: none"> Provided

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RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – very robust• P – Maine DHHS experience
2. Subcontractors
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• Bidder met Requirements
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• Upon request?
6. Certificate of Insurance
<ul style="list-style-type: none">• Bidder met Requirements

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DATE: Jan 28, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
• Bidder met Requirements
• Bidder met Requirements
• Bidder met Requirements
• Bidder met Requirements
B. Communication
• P – Detailed, portal
• Bidder met Requirements
• Bidder met Requirements
• P - one, not three
• Bidder met Requirements
C. TANF and ASPIRE-TANF Participant Survey
• P – sensitive to survey length
• P – both qual and quant
• Good response, but not overly impressive
• P – I like the process, telephone option
• N – no timeline
• P – Detailed response, with +/-
• N- Spanish, economic response
• P – telephone
• N – no paper, Spanish
• P - detailed
D. Data Collection, Analysis, and Reporting
• Bidder met Requirements
• N- missing data
• Bidder met Requirements
E. Representative Group
• N – Response lacks detail
• N - Response lacks detail
• N - Response lacks detail
F. Reports
• Bidder met Requirements
• Bidder met Requirements

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2. Staffing
<ul style="list-style-type: none">• Bidder met Requirements
<ul style="list-style-type: none">• None
<ul style="list-style-type: none">• Bidder met Requirements• Time allocation over what period?
3. Implementation - Work Plan
<ul style="list-style-type: none">• Organized, detailed.• Rep group timeline realistic?

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DATE: 01/27/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Based in Portland, ME. • I - Specializes in advanced survey methods. • I – 100,00 surveys and 75 project per year. • I – Almost 25 years’ experience. • I – Focus group moderators trained at RIVA Institute. • I – Voxco online – multi-language capability; Teleform – Optical scanning software. • Q – Work with Marketing Systems Group? • I – incorporate storytelling concepts • I – Previous/current agreements with the Department • I – 3 projects provided, all relevant.
2. Subcontractors
<ul style="list-style-type: none"> • None Stated
3. Organizational Chart
<ul style="list-style-type: none"> • I – Provided, project team unclear.
4. Litigation
<ul style="list-style-type: none"> • None Stated
5. Financial Viability
<ul style="list-style-type: none"> • Do not produce audited financial statements. • I – Provided various financial data elements indicating they have been profitable every year since 2002. • I – Have been awarded and had the capacity to complete many large projects.
6. Certificate of Insurance
<ul style="list-style-type: none"> • I – Provided, expires 02/01/25, Professional Liability of \$5m

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 01/27/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement.
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement. • I – Accessible to people with disabilities, limited English proficiency, and others.
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement. • I – Normally use Microsoft SharePoint.
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement.
B. Communication
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement. • I – Access to client monitoring portal in survey software.
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement.
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement.
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement.
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Trained in the science of survey design • I – Online review of existing surveys that have been published • I – Incorporate intelligent skip logic to answer only questions that apply. • I – Response does not specifically address all RFP requirements.
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement. • I – A task matrix to differentiate MDR responsibilities from the Department.
<ul style="list-style-type: none"> • I – Does not address diversity of experience or self-selection bias in response.
<ul style="list-style-type: none"> • I – Use of Voxco and CATI data collection software. • I – Able to switch between languages on the fly to facilitate multilingual interviewing. • I – Surveys can be completed in Spanish, online and by phone. • Q – Use of partner, M. Davis and Company for telephone calls. Sub-recipient? • I – Indicates using language line or the Department’s internal interpretation services. • N – Response does not address CY20214 or biannually thereafter.
<ul style="list-style-type: none"> • I – Development and implementation of a quality assurance plan. • I – collected data stored in Voxco, Transport Layer Security (TLS) encryption.
D. Data Collection, Analysis, and Reporting

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none"> • I – Data analysis meeting to define how data, documentation, and analysis will be shared.
<ul style="list-style-type: none"> • I – Missing data will be identified and possibly imputed. • I – Thorough response provided for data handling and analysis. • N – Response did not address CY24 or biannual survey timing, due date of draft reports of 12/1/24, data interpretation, editing rights of the Department, or approval needed for dissemination.
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement.
E. Representative Group
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement.
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement.
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement.
F. Reports
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement.
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement.
2. Staffing
<ul style="list-style-type: none"> • I – Attachment 7 provided • N – Did not include resume for Davis Thornton, listed on attachment 7, but not included on project org chart.
<ul style="list-style-type: none"> • I – States no subcontractors will be used but refers to working with “partners” in previous RFP responses, Part IV, Section II, #1, Part IV, Section III, Part II C4.
<ul style="list-style-type: none"> • I – Attachment 8 provided • N – Staffing plan includes Gary Hauger and Telephone Interviewer who are not included in attachment 7 or previously disclosed.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • I - Attachment 9 provided

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> • I – Provided • I – Does not match hours in staffing plan; Manager 100 vs 110, Analyst 73 vs 74, Telephone Interviewer 1000 vs 800. • I – Travel appears to be for one in-person meeting. • I – Supplies cost does not include detail/breakdown of expenses.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 26-JAN-2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI- DHHS - Maine

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Provided write-up states that the team completes 100,000 surveys and 75 projects each year. +/- • Served clients in over 35 different states reflecting a diverse client base
2. Subcontractors	<ul style="list-style-type: none"> • None provided
3. Organizational Chart	<ul style="list-style-type: none"> • Requirement met.
4. Litigation	<ul style="list-style-type: none"> • No concerns
5. Financial Viability	<ul style="list-style-type: none"> • No documents provided; however, not an immediate concern
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided – requirement met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 26-JAN-2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI- DHHS - Maine

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met
B. Communication
<ul style="list-style-type: none"> No concerns.
<ul style="list-style-type: none"> No concerns.
<ul style="list-style-type: none"> Requirement met.
<ul style="list-style-type: none"> Requirement exceeded.
<ul style="list-style-type: none"> Requirement met
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> Defer to team experts
<ul style="list-style-type: none"> Defer to team experts
<ul style="list-style-type: none"> Defer to team experts
<ul style="list-style-type: none"> Defer to team experts
<ul style="list-style-type: none"> Requirement met
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> No concerns currently.
<ul style="list-style-type: none"> Data weighting is fine but the details should be discussed with the Department prior to implementation.
<ul style="list-style-type: none"> Work plan provided is concise yet detailed and can be employed with a minimal amount of fine tuning.
E. Representative Group
<ul style="list-style-type: none"> No concerns with proposed process.
<ul style="list-style-type: none"> Special complications may arise with participation rates with the TANF population. Without careful consideration, this has the danger of skewing the results.
<ul style="list-style-type: none"> No concerns.
F. Reports
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> No concerns.
2. Staffing
<ul style="list-style-type: none"> Requirement met. No concerns

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 26-JAN-2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI- DHHS - Maine

<ul style="list-style-type: none">• n/a
<ul style="list-style-type: none">• Staff includes 2 bi-lingual staff on the survey interview/response team.
3. Implementation - Work Plan
<ul style="list-style-type: none">• Work plan is provided at a high level but is feasible and meets requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 1/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Based in Portland Maine• 10+ years of experience, 25 years collecting data• 100,000 surveys and 75 projects each year across 35 states
2. Subcontractors
<ul style="list-style-type: none">• None listed
3. Organizational Chart
<ul style="list-style-type: none">• Provided, with names, positions
4. Litigation
<ul style="list-style-type: none">• None listed
5. Financial Viability
<ul style="list-style-type: none">• Appears to be financially viable
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 1/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Confirmed staff will be available during these times/days
<ul style="list-style-type: none"> Did not say they would meet SOM policies, only State and Federal
<ul style="list-style-type: none"> Will meet reading material requirements
<ul style="list-style-type: none"> They can meet the needs of the department
<ul style="list-style-type: none"> All materials during or after the contract will be provided for use to SOM
B. Communication
<ul style="list-style-type: none"> MDR staff will be available to meet as requested
<ul style="list-style-type: none"> Included their approach to communicating with SOM
<ul style="list-style-type: none"> Propose a kick off meeting to discuss all of these topics
<ul style="list-style-type: none"> Meetings will cover topics as requested in the RFP
<ul style="list-style-type: none"> MDR agrees to communicate via any format agreed upon
<ul style="list-style-type: none"> MDR has a goal of 1 business day
<ul style="list-style-type: none"> All external communication will be approved by Som before release
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> Will begin with initial design meeting to brainstorm topics and questions
<ul style="list-style-type: none"> Will conduct online review for existing surveys
<ul style="list-style-type: none"> Will develop a 15 min survey or less
<ul style="list-style-type: none"> Will provide detailed project work plan
<ul style="list-style-type: none"> Outlines of deliverables and tasks
<ul style="list-style-type: none"> Listed steps for their approach, including QR code, links, and a 1-800 number for questions
<ul style="list-style-type: none"> Sample will meet these requirements
<ul style="list-style-type: none"> 800 surveys in the sample
<ul style="list-style-type: none"> Will translate final survey and materials into Spanish
<ul style="list-style-type: none"> Talks about using a partner? M. Davis and company? For calls
<ul style="list-style-type: none"> Use Voxco which offers highest levels of data security
<ul style="list-style-type: none"> Use Azure -Sharepoint for all their files
<ul style="list-style-type: none"> Follow HIPAA and PII policies
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> Will develop data analysis plan to guide the process
<ul style="list-style-type: none"> Provide clear definitions of collection and analysis of high quality data
<ul style="list-style-type: none"> They use SPSS software to clean and review survey data
<ul style="list-style-type: none"> They do not state submitting draft reports or any dates

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DATE: 1/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none"> • Reporting approach is flexible and will meet the needs of SOM
E. Representative Group
<ul style="list-style-type: none"> • Will form a representative group of volunteers who can contribute
<ul style="list-style-type: none"> • MDR will lead meetings, calls, agendas, notes and recruitment
<ul style="list-style-type: none"> • Will provide support where appropriate • States content and format and presentation of separate report will be developed by the representative group • Takes time to organize volunteer group
F. Reports
<ul style="list-style-type: none"> • Will track, record and maintain all records related to the reports listed above. • Will submit reports following the timeline established in the rfp
2. Staffing
<ul style="list-style-type: none"> • Attachment 7 is provided and meets requirements • No subcontractors are used • Staffing plan is included in attachment 8 • Telephone interviews are not listed by staff member • Times are included in hours
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Work plan is included in attachment 9 • Displays work plan, not sure on realistic

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Based on Portland ME • Uses in house resources and had their own call center with software for online and telephone data collection. • 100K surveys completed with 75 project a year in more than 35 states for nearly 25 years. • Vendor provided a significant amount of detail in this section not requested by the template to indicate structure, history, and expertise. • Prior project details included as request that align with this effort.
2. Subcontractors
<ul style="list-style-type: none"> • None.
3. Organizational Chart
<ul style="list-style-type: none"> • Provided. Resource names assigned to each position.
4. Litigation
<ul style="list-style-type: none"> • None.
5. Financial Viability
<ul style="list-style-type: none"> • Document without any independent auditor signoff, review, or reference. • I did not expect this document in lieu of financial or auditor statements. • Provided upon request—I found this interesting since the RFP is ‘the request’.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided. All insurance carriers, types and limits are held and noted in the certificate.

**STATE OF MAINE
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BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor confirmed and will comply with the requirement. • Vendor confirmed and will comply with policies and requirements. • Vendor confirmed and will comply with this requirement. • Vendor confirmed and will comply with this requirement.
B. Communication
<ul style="list-style-type: none"> • Vendor confirmed and will comply with this requirement. • Client centered project management philosophy • Inception to closeout using meetings, regular updates, weekly project, and collaboration. Dept will have access to client monitoring portal to view data collected/survey process in real time.
<ul style="list-style-type: none"> • Vendor confirmed and will comply. • Vendor will address all topics in addition to items above as needed and as they arise.
<ul style="list-style-type: none"> • Vendor restated the requirement and confirmed.
<ul style="list-style-type: none"> • Vendor confirmed need, but expressed 1 business day is what the Dept. can expect a response to any correspondence. • Restated requirement and will comply.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Response parroted detailed in the requirements and will comply. • Brief responses are appreciated •
<ul style="list-style-type: none"> • QR codes with links with a unique respondent ID, 1800 number or mailed. • Provided detailed proposed sampling goals for each stratum with sample sizes and confidence/error percentages. • Surveys available in English and Spanish. • Oversampling of racial and ethnic minorities proposed to properly represent populations that typically do not respond to survey requests.
<ul style="list-style-type: none"> • Voxco Data collection + CATI software for telephone, online and paper form data entry. • Skip patterns, multi language capability and automatic device detection for mobile friendly design. • Surveys and reminders sent by text • Real time results are available with secure reporting portal.

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EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • Vendor will manage printing and mailing survey materials. • AAPOR training standards • Translation through language line or Dept resources.
<ul style="list-style-type: none"> • Highest level of security available TLS and HTTPS (exact protocol not provided) • HIPAA compliant policies for data security • Sharepoint and Azure in use • CISO completes regular security audits of program policies and procedures
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Vendor will comply and ensure work is done in a collaborative manner.
<ul style="list-style-type: none"> • Data will be exported, reviewed, cleaned and QA processes applied using SPSS software. • Vendor complies with initial and recurring submission schedule for the report.
<ul style="list-style-type: none"> • Vendor complies with the requirement and will work with the Dept..
E. Representative Group
<ul style="list-style-type: none"> • Vendor will comply with the requirement.
<ul style="list-style-type: none"> • Vendor will comply with the requirement.
<ul style="list-style-type: none"> • Vendor will manage and supply staff to support these requirements.
F. Reports
<ul style="list-style-type: none"> • Vendor will comply and provide reports that align with dept. expectations. • Reports will be submitted timely.
2. Staffing
<ul style="list-style-type: none"> • Provided and meets requirements.
<ul style="list-style-type: none"> • No subcontractors.
<ul style="list-style-type: none"> • Included and complies with requirement. Names and positions are clearly identified.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Workplan included. • Typical workplan format with tasks, project milestone groups, dates and resource teams identified.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 1/24/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • P - In-State • Strong staff qualifications and experience • Worked on Maine's CHNA • Several previous projects listed, one with Maine DHHS-OBH, experience working with target population for current services
2. Subcontractors	<ul style="list-style-type: none"> • No subs
3. Organizational Chart	<ul style="list-style-type: none"> • Meets requirement
4. Litigation	<ul style="list-style-type: none"> • None listed
5. Financial Viability	<ul style="list-style-type: none"> • For-profit • Limited financial info
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Market Decisions LLC, dba Market Decisions Research

DATE: 1/24/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement • Staff member named to review for accessibility
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
B. Communication
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • I - Forgot to update their template language • Meets requirement
<ul style="list-style-type: none"> • Acknowledged requirement
<ul style="list-style-type: none"> • Acknowledged requirement
<ul style="list-style-type: none"> • Meets requirement
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Mentioned adding visual clues to aid survey comprehension • Suggested reviewing online surveys of the same topic for input • Both closed- and open-ended questions • 15 minutes for survey completion by respondents
<ul style="list-style-type: none"> • Proposes task matrix outlining Department and vendor responsibilities • Seems mail-focused for initial outreach, but also mentioned email and phone – no text
<ul style="list-style-type: none"> • Detailed information on goals for number of participants and anticipated margin of error • P - Mentioned equity, proposed over-sampling racial and ethnic minorities • Specifies survey will be available in Spanish, but unclear how Maine’s other large linguistic communities will access the survey • I - Interviews included in addition to surveys
<ul style="list-style-type: none"> • Using Voxco software, including online surveys • P – Follow-up calls to non-respondents to have them complete survey over the phone • Q – Unclear if/how follow-up calls includes translation services • Well-researched mail delivery method • Unclear how outreach accommodates non-native English-speakers • Calling same person at different times of day if non-responsive initially

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DATE: 1/24/2024

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EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none"> • Work with the Department to identify other languages, using interpreter service • Meets requirements
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Meets requirements • Q – Bidder possibly unclear about additional data analysis needed for the legislative report in addition to the survey, e.g. DHHS and DOL enrollment and demographic data • N - Doesn't address the final statutory biennial report to the legislature – missed half the scope of work
E. Representative Group
<ul style="list-style-type: none"> • Rep. group will include input from Department, potentially survey respondents, and stakeholders • I - Relying on experience, brief description of process • P – Good description of eliciting input from group, sharing common goals, clarifying amount of work, etc. • Specifies that rep. group drafts the report • Notes challenge of timeframes and schedules with rep. group, shows experience
F. Reports
<ul style="list-style-type: none"> • Acknowledged • Acknowledged
2. Staffing
<ul style="list-style-type: none"> • Included • No subs • 996 hours
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: Jan 28 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – TANF Expertise• N – more than collecting information
2. Subcontractors
<ul style="list-style-type: none">• UME - Cutler
3. Organizational Chart
<ul style="list-style-type: none">• Detailed
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• Bidder met Requirements
6. Certificate of Insurance
<ul style="list-style-type: none">• Bidder met Requirements

**STATE OF MAINE
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BIDDER NAME: MEF Associates

DATE: Jan 28 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • Bidder met Requirements
B. Communication
<ul style="list-style-type: none"> • P – recognize quick turnaround
<ul style="list-style-type: none"> • Good Variance
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • Understood the assignment
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – cash benefit
<ul style="list-style-type: none"> • N- 25 percent not required in ASPIRE
<ul style="list-style-type: none"> • N – leading questions
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • P – Good detail
<ul style="list-style-type: none"> • I – community organizations
<ul style="list-style-type: none"> • P – Culter
<ul style="list-style-type: none"> • P – phone
<ul style="list-style-type: none"> • N – paper explore
<ul style="list-style-type: none"> • VP – language
<ul style="list-style-type: none"> • N - no phone in ESOL
<ul style="list-style-type: none"> • N - \$5000 charge
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • P – Robust an aware response
<ul style="list-style-type: none"> • Bidder met Requirements
<ul style="list-style-type: none"> • N – one trip?
E. Representative Group
<ul style="list-style-type: none"> • P – I like the detailed and thoughtful repsonse
<ul style="list-style-type: none"> • P -awareness
<ul style="list-style-type: none"> • N – overthought/engineered
<ul style="list-style-type: none"> • N – overthought/engineered

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: Jan 28 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

F. Reports
<ul style="list-style-type: none">• Bidder met requirements
<ul style="list-style-type: none">• Bidder met requirements• P – good timeline
2. Staffing
<ul style="list-style-type: none">• P – Detailed
<ul style="list-style-type: none">• P - Cutler
<ul style="list-style-type: none">• Bidder met requirements
3. Implementation - Work Plan
<ul style="list-style-type: none">• P – very detailed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 01/28/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • I – Founded in 2009 • I – 35 employees • P – Previous TANF knowledge • P – Recently completed study: U.S. Department of Health and Human Services Administration for Children and Families (ACF), Understanding Poverty: Childhood and Family Experiences and TANF Office Culture. • I – Experience with state legislatures • I – 3 relevant projects provided
2. Subcontractors	<ul style="list-style-type: none"> • I – Survey Research Center, Catherine Cutler Institute, University of Southern Maine – Research arm of the Muskie School of Public Service. • I – Provides annual Children’s Health Insurance Program (CHiP) survey.
3. Organizational Chart	<ul style="list-style-type: none"> • I – Provided with project staff highlighted.
4. Litigation	<ul style="list-style-type: none"> • I – None Stated
5. Financial Viability	<ul style="list-style-type: none"> • I – Income Statements and Balance Sheets provided, not audited. • I – Appear financially viable
6. Certificate of Insurance	<ul style="list-style-type: none"> • I – Provided, expires 12/09/24, Prof. Errors, and Omiss of \$1m

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 01/28/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement • I – will work to familiarize themselves with all policies and procedures.
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement
B. Communication
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement
<ul style="list-style-type: none"> • I – Response acknowledges meeting with the department, but does not address individual items.
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Will seek input from Representative group • I – Acknowledge adherence to RFP requirement
<ul style="list-style-type: none"> • N – After survey is complete, Department has input.
<ul style="list-style-type: none"> • I – Acknowledges all points except self-selection bias.
<ul style="list-style-type: none"> • I – Survey will be administered by subcontractor, SRC. • I – Will utilize scaffolded approach • I – Qualtrics survey • I - \$20 incentive offered for survey completion • P – Online survey available in 5 languages, Arabic, French, Portuguese, Somali, and Spanish. • I – SRC feels there is a conflict to use an interpreter to administer a survey seeking information about interpreter services provided to participants.
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement • I – Cloud based storage id FedRAMP compliant. • I - can purchase advanced security measures (HIPAA Compliant) and be issued a Business Associate Agreement at a cost of \$5k annually that is not included in the budget.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • I – Acknowledge adherence to RFP requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 01/28/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

- I – Acknowledges compiling, analyzing, and processing data and submitting draft report to the department by 12/1/24.
- N – Does not address biannual reporting or the Department retaining all editing rights or approval the content of, publish, and dissemination of final reports.

- I – Acknowledge adherence to RFP requirement
- I – Can provide a draft PowerPoint presentation

E. Representative Group

- I – Acknowledge adherence to RFP requirement
- I – Plan a group of 10 participants

- I – Engagement with the members will be a continuous iterative process and inclusive in all stages of the research.
- I – Hoping to revisit compensating RG members.

- I – Acknowledge adherence to RFP requirement
- I – Training in presentation skills for all RG members
- I – Presentation rehearsal opportunities.

F. Reports

- I – Acknowledge adherence to RFP requirement

- I – Acknowledge adherence to RFP requirement

2. Staffing

- I – Attachment 7 Provided
- Project Staffing Overview provided, includes an Equitable Evaluation Consultant not previously identified in Part I org chart.

- I – Provided
- I – MEF and SRC will work with development to develop the methodology for selecting the survey sample.

- I – Attachment 8 provided
- I – Includes Manpower temps not disclosed as sub-contractor or sub-sub-contractor

3. Implementation - Work Plan

- I – Attachment 9 provided

Part IV, Section IV. Cost Proposal

- I – Provided
- I – SRC cost includes incentive funds and all costs to print and administer the survey.
- I – Travel included for 2 trips from DC of \$2527.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/26/2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI – DHHS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> Noted experience with working with the TANF program Experienced with working with very similar goals as to what they will be working on for us.
2. Subcontractors	<ul style="list-style-type: none"> Subcontractor (1) listed as being affiliated with the University of Southern Maine
3. Organizational Chart	<ul style="list-style-type: none"> Chart provided and indicates that the core work team consists of a team of 6
4. Litigation	<ul style="list-style-type: none"> None listed.
5. Financial Viability	<ul style="list-style-type: none"> Defer to financial expert team members.
6. Certificate of Insurance	<ul style="list-style-type: none"> Provided – requirement met.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/26/2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI – DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Primary contact resides in the same time zone and is stated to be available as requested.
<ul style="list-style-type: none"> • No mention of PII safeguards – not necessarily a concern currently.
<ul style="list-style-type: none"> • Requirement met but vaguely worded
<ul style="list-style-type: none"> • Requirement met
B. Communication
<ul style="list-style-type: none"> • No concerns
<ul style="list-style-type: none"> • Communication plan is to initially meet bi-weekly and then monthly once the survey has been approved. The proposed meeting tempo is less than I'd expect but there are no further concerns at this time.
<ul style="list-style-type: none"> • Requirement met.
<ul style="list-style-type: none"> • Requirement met – vendor states that they intend on responding sooner than the 3 day minimum.
<ul style="list-style-type: none"> • No concerns • Vendor has gone so far as to agree to sign an NDA, although that should be necessary.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Specific TANF program experience noted. • Prior work cited is very much along the lines of what the LIFT Report is meant to portray • The proposed survey design takes into account the specific TANF population by noting that only the first half of the survey is expected to be completed by Non-ASPIRE participants.
<ul style="list-style-type: none"> • No concerns at this time but also not much detail provided. Overall message is that more detail will be provided once contract is awarded.
<ul style="list-style-type: none"> • The current plan is feasible but involves sampling $\frac{3}{4}$ of the current TANF population to ensure a decent margin of error and overall response rate.
<ul style="list-style-type: none"> • Vendor states that USM, their subcontractor, will administer the survey. • \$20 incentive provided to survey participants • The Survey will support of multiple languages including Arabic, French, Portuguese, Somali and Spanish; some of the largest language groups of the immigrant population. • No foreign language works will support telephone outreach

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/26/2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI – DHHS

<ul style="list-style-type: none"> • Cloud storage is FedRAMP compliant. HIPAA compliance for the survey will be obtained through Qualtrics – the online survey provider.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • All staff will sign confidentiality agreements • FedRAMP and certified HIPAA compliant
<ul style="list-style-type: none"> • Timeline provided is detailed and well thought out
<ul style="list-style-type: none"> • Amount budgeted for in person representation if desired as part of presentation to the Joint Standing Committee.
E. Representative Group
<ul style="list-style-type: none"> • Requirement met; although, I'm curious how receptive the TANF population will be in relation to the vendor's current expectations.
<ul style="list-style-type: none"> • Very well thought out. I like the vendor's 'empowerment' strategy.
<ul style="list-style-type: none"> • 3.A met requirements but little was mentioned in regard to 3.B.
F. Reports
<ul style="list-style-type: none"> • Well planned.
<ul style="list-style-type: none"> • Detailed plan provided. No concerns.
2. Staffing
<ul style="list-style-type: none"> • Requirement met and is both detailed and thorough.
<ul style="list-style-type: none"> • Subcontractor will be used for the survey administration which makes sense as the subcontractor is affiliated with the UMaine System.
<ul style="list-style-type: none"> • Requirement met. No concerns.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • No concerns. Work plan matches the same level of detail as the majority of other responses.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/29/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Dept/Group

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Founded in 2009 • Small company • TANF expertise
2. Subcontractors	<ul style="list-style-type: none"> • Survey Research Center
3. Organizational Chart	<ul style="list-style-type: none"> • Provided, no names but yellow boxes for project staff, names included
4. Litigation	<ul style="list-style-type: none"> • None
5. Financial Viability	<ul style="list-style-type: none"> • Appear to be financially viable, small company
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided certificate

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/29/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Dept/Group

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> States the Project director will be available 8 to 5 M-F
<ul style="list-style-type: none"> States they will review the policies but meet State and Federal guidelines
<ul style="list-style-type: none"> They assess written products to ensure they meet the requirements
<ul style="list-style-type: none"> Can provide materials on any medium agreed upon
<ul style="list-style-type: none"> Will provide materials in Word or Powerpoint for reuse and editing
B. Communication
<ul style="list-style-type: none"> Will propose regular schedule during kickoff meeting
<ul style="list-style-type: none"> Will schedule meetings every other week during the first 3 months of project
<ul style="list-style-type: none"> During kickoff meeting will establish protocols for communication
<ul style="list-style-type: none"> Will meet 3 business day response request but expect faster responses
<ul style="list-style-type: none"> Will not communicate any external without permission from SOM
<ul style="list-style-type: none"> Will sign NDA or other forms for all staff working on project if desired
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> Proposing a 20 min survey
<ul style="list-style-type: none"> Review surveys for other projects, other states
<ul style="list-style-type: none"> Consult with University of Maine for best practices
<ul style="list-style-type: none"> Seek input from representative group
<ul style="list-style-type: none"> Consult MEF's internal EE workgroup
<ul style="list-style-type: none"> Kickoff will establish protocols for obtaining feedback and approval of design, execution and analysis.
<ul style="list-style-type: none"> Less meetings when survey is being fielded
<ul style="list-style-type: none"> Propose sample of 3225 cases with 525 completed interviews
<ul style="list-style-type: none"> Propose to oversample non white or non English households
<ul style="list-style-type: none"> Will subcontract with SRC to administer the survey
<ul style="list-style-type: none"> Will be translated into 5 languages
<ul style="list-style-type: none"> No staffing to provide survey orally in languages other than English
<ul style="list-style-type: none"> Annual training and experience keeping data confidential
<ul style="list-style-type: none"> Cloud storage is FedRAMP compliant.
<ul style="list-style-type: none"> States not HIPAA compliant
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> Will work with SOM to develop a detailed plan to obtain data
<ul style="list-style-type: none"> Will review report submitted earlier
<ul style="list-style-type: none"> Will submit draft report by November 15th, final draft by December 1, 2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: MEF Associates

DATE: 1/29/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Dept/Group

<ul style="list-style-type: none"> • Have included funds for one trip to Maine to participate in presentation to JSC • Will assist in creating a presentation for the JSC
E. Representative Group
<ul style="list-style-type: none"> • Will use kickoff meeting to formalize recruitment and engagement plan • Will include current and former participants • Would like to compensate RG participants? • Will be considered research team members
<ul style="list-style-type: none"> • Will convene the RG group early to include them through the entire process
<ul style="list-style-type: none"> • Will offer training sessions on survey research • Will provide support if the RG group wishes to present their report
F. Reports
<ul style="list-style-type: none"> • Will provide reports as requested
<ul style="list-style-type: none"> • Provided a report name and schedule in the response
2. Staffing
<ul style="list-style-type: none"> • Included in attachment 7
<ul style="list-style-type: none"> • MEF will develop the content but will rely on SRC for the format
<ul style="list-style-type: none"> • Provided a staffing plan in attachment 8 • 3919 total hours, with 2289 just for survey design and execution
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Included in attachment 9 • Includes a chart, time line

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • 35 employees founded in 2009. • Proven track record with depth of experience • Nationally recognized REFFRAME • 3 projects described
2. Subcontractors	<ul style="list-style-type: none"> • Survey Research Center, Catherine Cutler Institute USM
3. Organizational Chart	<ul style="list-style-type: none"> • Provided. Not all positions had named resources.
4. Litigation	<ul style="list-style-type: none"> • None
5. Financial Viability	<ul style="list-style-type: none"> • P&L and balance sheet provided. Audit report provided by Stitely and Karstetter
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided. All insurance policy details, providers and amounts included for each category in the certification.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided.
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor confirms requirement and will comply.
<ul style="list-style-type: none"> • Vendor confirms and will comply with policies and requirements. Specifically mention ADA508 compliance and reading levels.
<ul style="list-style-type: none"> • Vendor will comply and confirm protocols for exchanging data with the dept. at initial kickoff for secure data transfer.
<ul style="list-style-type: none"> • Vendor will use standard formats and all materials for the dept. will be easy for the department to reuse.
B. Communication
<ul style="list-style-type: none"> • Vendor will comply with this requirement and believes in regular meetings to stay on track. Schedule defined in kickoff meeting.
<ul style="list-style-type: none"> • First 3 months vendor expects to meet every other week. While they survey is being fields reduce to once a month with weekly updates of response rates. During analysis phase, frequency will increase.
<ul style="list-style-type: none"> • Vendor complies and all methods will be fully elaborated during kickoff.
<ul style="list-style-type: none"> • Client centered firm.
<ul style="list-style-type: none"> • Will comply with requirement, but response time may be faster.
<ul style="list-style-type: none"> • Vendor complies and will not initiate any external communication without prior approval.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • 20 minutes in length • Provided a categorical breakout of sections • Cultural Competency and Accessibility section
<ul style="list-style-type: none"> • Frequent meetings, Dept input and feedback. • This will be elaborated in the kick off meeting.
<ul style="list-style-type: none"> • Vendor described the counts and groupings of survey categories and sized and will pretest the survey with a small group of current/former participants.
<ul style="list-style-type: none"> • Email, letter, phone will be used to gain high response rates. • Letters will have a QR code and tiny URL with an invitation for Qualtrics survey • Translations for 5 languages: Arabic, French, Portuguese, Somali and Spanish. This can be modified by request. • Phone translation support not available unless language line available.
<ul style="list-style-type: none"> • Computer controls with encrypted workstations, automated lockouts, and multifactor authentication.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: MEF Associates

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • All cloud storage FedRAMP compliant. • Qualtrix. Advanced security for HIPAA can be pushed in advance and be issued a BAA for \$5k (optional amount if needed and not included in cost proposal).
<p>D. Data Collection, Analysis, and Reporting</p>
<ul style="list-style-type: none"> • 1st 3 months focused on developing a detailed plan to execute the plan and get the data asap to expedite analysis.
<ul style="list-style-type: none"> • Vendor will comply with this requirement and schedule. • Vendor cited collection and analysis time is short so staff is increased for analysis and report creation phase.
<ul style="list-style-type: none"> • Report and submission schedule will be met by the vendor. • Vendor will also provide ad supplemental presentation for dept. use at anytime. • Cost proposal included one trip travel costs if deemed necessary by the dept.
<p>E. Representative Group</p>
<ul style="list-style-type: none"> • Data classifications will be finalized in kickoff meeting. Outreach strategy will be discussed with input from dept and case managers.
<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Vendor will comply • Breakout session, feedback polls will be employed • Participants will not be compensated. Vendor hopes this will be reconsidered.
<p>F. Reports</p>
<ul style="list-style-type: none"> • Audio recordings if participants agree • Training will be offered • Timeline with tasks and dates embedded in this section.
<ul style="list-style-type: none"> • All activities undertaken will be included in reports. • Execution metrics will be provided in quarterly reports that will be provide bi month due to the short duration and of the project timeline. • Delivery schedule embedded in this section for Quarterly reports and dates for activity reports.
<p>2. Staffing</p>
<ul style="list-style-type: none"> • Position titles and names provided in an org. chart. • Titles and experience details provided for each member
<ul style="list-style-type: none"> • Subcontractor staff will attend meetings and act as a liaison with the SRC. • Attend meetings, provide monthly progress reports, and lead developing survey content and quality assurance tasks.
<ul style="list-style-type: none"> • Staffing plan with resource and hour allocations provided for each phase of the effort.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

3. Implementation - Work Plan
<ul style="list-style-type: none">• Plan included timelines and appeared complete with companion narrative provided to respond to this section.• Subcontractor duties clearly defined and described.• Significant amount of effort invested in the narrative with detailed dates for each delivery, task, and phase.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/24/2022

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Small company • Out-of-state, for-profit • Sub in-state, USM • TANF-specific experience, TANF-funded program outcomes • Several similar projects
2. Subcontractors	<ul style="list-style-type: none"> • One sub (in-state) with experience in survey administration in Maine
3. Organizational Chart	<ul style="list-style-type: none"> • Provided
4. Litigation	<ul style="list-style-type: none"> • None listed
5. Financial Viability	<ul style="list-style-type: none"> • Provided
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/24/2022

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Acknowledged requirement • I - Stated experience adjusting for reading level, no description of process • Meets requirement • Meets requirement
B. Communication
<ul style="list-style-type: none"> • Meets requirement • Meets requirement • Meets requirement • Meets requirement • Proposed NDAs for their staff
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • 20-minute survey, split 10-minutes for TANF and enrollment process, and 10-minutes for ASPIRE services – estimates 1/4 of respondents will only need to complete first half • Will review previous surveys in Maine and other states around TANF • Dedicated Equitable Evaluation Workgroup to review survey for equity concerns • Proposed additional survey topics
<ul style="list-style-type: none"> • Acknowledged requirement • Mentioned pace of meetings is heavier while methodology is being reviewed by Department
<ul style="list-style-type: none"> • Looked at the current number of TANF cases ahead of time • Provided estimates of response rates based on ethnicity and proposed over-sampling minority groups with fewer respondents, mentioned non-English speakers specifically • P - Estimate of BIPOC and/or non-English speakers aligns with ACF data for Maine from 2020 • Proposed having the rep. group review the survey if it is formed early enough, otherwise will work with CBOs that work with TANF families
<ul style="list-style-type: none"> • Email, letter, phone • Proposed \$20 incentive for respondents • Qualdric • Follow up with letters

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/24/2022

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none"> • Final effort is six attempts by phone, rotating timing • Online survey in five languages – Arabic, French, Portuguese, Somali, and Spanish – great representation of Maine’s linguistic communities • Invitation to complete the survey will be included in emails/letters in these languages as well • Phone surveys will only be in English - specifically anti-language-line for phone calls
<ul style="list-style-type: none"> • Proposed additional \$5,000 cost outside of budget for HIPAA software
<p>D. Data Collection, Analysis, and Reporting</p>
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Will review previous version of this legislative report • Work on report while survey is fielded • I – Proposed bringing rep. group feedback directly into Department’s legislative report
<ul style="list-style-type: none"> • Meets requirement
<p>E. Representative Group</p>
<ul style="list-style-type: none"> • Suggests max ten members • Attempt to be diverse, notes small size of proposed group as challenge to diversity
<ul style="list-style-type: none"> • Mentioned Maine’s DEI plan • Rep. group members are experts in their own lives and experience • Q – Suggesting the rep. group is involved with entire survey and legislative report process • Q - Requesting to compensate rep. group members, TANF-funding concerns • Collaborative approach to rep. group structure between vendor and members
<ul style="list-style-type: none"> • I - Training rep group members on survey research methods, vastly expanded role for rep. group • Mentioned high cost of transportation in Maine as barrier to in-person • Intensive support for rep. group
<p>F. Reports</p>
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
<p>2. Staffing</p>
<ul style="list-style-type: none"> • Provided
<ul style="list-style-type: none"> • Vendor will develop content of survey, sub will format, coordinate on methodology
<ul style="list-style-type: none"> • 3,919 hours

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: MEF Associates

DATE: 1/24/2022

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: Jan 28 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
	<ul style="list-style-type: none">• P – Maine experience
2. Subcontractors	
	<ul style="list-style-type: none">• P - language
3. Organizational Chart	
	<ul style="list-style-type: none">• Bidder met requirements
4. Litigation	
	<ul style="list-style-type: none">• None
5. Financial Viability	
	<ul style="list-style-type: none">• Bidder met requirements
6. Certificate of Insurance	
	<ul style="list-style-type: none">• Bidder met requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: Jan 28 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
• Bidder met requirements
• Bidder met requirements
• Bidder met requirements
• Bidder met requirements
B. Communication
• Bidder met requirements
• Bidder met requirements
• Bidder met requirements
• Bidder met requirements
• Bidder met requirements
C. TANF and ASPIRE-TANF Participant Survey
• P – TANF-specific
• N – Typo
• N – steering committee
• P – all three modes
• P – Detailed, all three modes
• P - Language
• P – specific and detailed
D. Data Collection, Analysis, and Reporting
• P – work with other partners
• Bidder met requirements
• P – cites previous experience
• N – not specific
E. Representative Group
• Bidder met requirements
• I – incentive; in-person
• N – Over-engineered
• N- APHSA Core Principles
F. Reports
• Bidder met requirements
• Bidder met requirements
2. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: Jan 28 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: OFI/DHHS

<ul style="list-style-type: none">• Bidder met requirements
<ul style="list-style-type: none">• Bidder met requirements
<ul style="list-style-type: none">• Different fonts• Smart people
3. Implementation - Work Plan
<ul style="list-style-type: none">• Good outline, detailed, but lacking specific dates.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 01/28/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I – more than 30 years’ experience • I – Specialize in social science and public health sector market research • I – Founded in 1985 • I – Based on Portland, ME • P – experience working with vulnerable Maine populations • I – correct translation of sensitive materials into many languages • I – 3 relevant projects provided • I – Did not use current RFP Appendix A and include VC number, in Advantage as Edes, LLC, d/b/a Pan Atlantic Research • I – Current DHHS/CDC provider through 6/30/24 for MIYHS.
2. Subcontractors
<ul style="list-style-type: none"> • I – Voxco – online survey implementation, secure data hosting • I - Maine Language Connect – translation of materials and via phone – authorized SOM vendor
3. Organizational Chart
<ul style="list-style-type: none"> • I – Provided, including subcontractors
4. Litigation
<ul style="list-style-type: none"> • I – None stated
5. Financial Viability
<ul style="list-style-type: none"> • I – Small business w/o audited bank statements. Included tax returns, instead, but did not include all statements. • I – Reported losses in 2020 & 2021, Wages varied \$144k in 20, \$52k in 21, \$196k in 22.
6. Certificate of Insurance
<ul style="list-style-type: none"> • I – Included, expires 08/30/24, No Professional or Umbrella coverage.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 01/28/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I – Acknowledged stating “Agreed” • I – Acknowledged stating “Agreed” • I – Acknowledged stating “Agreed” • I – Acknowledged stating “Agreed”
B. Communication
<ul style="list-style-type: none"> • I – Acknowledged stating “Agreed” • I – Acknowledged stating “Agreed” • I – Acknowledged stating “Agreed” • I – Acknowledged stating “Agreed” • I – Acknowledged stating “Agreed”
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Acknowledged adherence to RFP requirements. • I – Will develop list of questions based on but not limited to a – h above. • I – Will assemble groups of stakeholders to generate questions. • I – Develop a codebook for the quantitative survey. • I – Recommends and assumes the creation of a steering committee.
<ul style="list-style-type: none"> • I – Codebook and final survey will be provided to the Department for approval.
<ul style="list-style-type: none"> • I – Initial contact of brochure followed by SMS, phone, email, and additional mailings. • I - \$15 Amazon or Hannaford gift card incentive for 1st 1000 participants. • N – Does not speak to diversity of experiences or self-selection bias.
<ul style="list-style-type: none"> • P – Online survey translated to French, Spanish, Portuguese, Arabic, and Somali, at a minimum. • N – Did not address administering the survey in 2024 or biannually thereafter.
<ul style="list-style-type: none"> • I – Will adhere to data security best practices.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement. • I – Password protected portal to transfer and store data.
<ul style="list-style-type: none"> • I – Acknowledges compiling, cleansing, and analyzing data. • I – Raw data files will be submitted to Department for approval. • I – Will submit reports available in RTF, XLS/X, or PDF format.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 01/28/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none"> • N – Does not address CY2024, biannually thereafter, or Department retaining editing rights, or approval of content before dissemination. • I – Acknowledges adherence to this requirement.
E. Representative Group
<ul style="list-style-type: none"> • I – Will recruit from respondents who complete survey, up to 20. • I – Incentive of \$125 per 90-minute session to encourage active participation. • I – In-person attendance at a DHHS Regional office. • I – Acknowledges adherence to this requirement • I – Will provide needed infrastructure, such as loaning computers, hosting and sharing drafts, and graphics support. • I – Provide presentation skills training, if needed.
F. Reports
<ul style="list-style-type: none"> • I – Acknowledges submitting reports timely, not tracking and recording data. • I – Acknowledges adherence to this requirement.
2. Staffing
<ul style="list-style-type: none"> • I – Attachment 7 provided. • I – Project Coordinator provides support to field administrators. Field administrators are not included on org chart. • I – Senior Programmer – Programs online survey for in-school distribution? Troubleshoots school administration issues? • Included Voxco positions, but not Maine Language Connect. • I – Provided, weekly meetings held during key periods of project where subcontractors are involved. • I – Escalation procedures in place in case of issues. • I – Attachment 8 provided • N – Time allocation not included in attachment 8.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • I – Provided repurposed 2023 MIYHS Work Plan. • N - Did not provide month task will be completed, but rather noted Year and Quarter.

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> • I – Provided • I – Included \$25k for incentives • I – Includes \$20k for mailings to 6500 households, \$3.08 per household.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 01/29/2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI - DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> Small team working closely with subcontractors from Voxco and Maine Language Connect. Appear to be experienced with working with immigrant populations in Maine.
2. Subcontractors	<ul style="list-style-type: none"> Voxco – located out of Montreal Quebec Maine Language Connect - Noted experience with working with low income and immigrant populations. Signifies significant strength in reaching non-English speaking population
3. Organizational Chart	<ul style="list-style-type: none"> Small team reflected
4. Litigation	<ul style="list-style-type: none"> None provided
5. Financial Viability	<ul style="list-style-type: none"> Defer to finance experts on team
6. Certificate of Insurance	<ul style="list-style-type: none"> Provided – no concerns

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 01/29/2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI - DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
B. Communication
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
<ul style="list-style-type: none"> • Could use more detail beyond 'Agreed' • Overall, not a good indicator of future work output/quality
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Typo in reference... not a good follow-up to the prior section. • Concerned that survey make-up may not be customized to meet the LIFT report goals/requirements. Example: "...goals of program participants rather than primarily based on Federal performance metrics" – This could be a dual edged sword.
<ul style="list-style-type: none"> • Survey creation will be a joint effort between vendor and TANF Steering committee. • It appears that VOXCO will administer the survey online and print.
<ul style="list-style-type: none"> • Provided response target is 1000 completed surveys • Stated 2.8% margin of sampling error which is sound • Recommendation includes offering the option of a \$15 Hannaford or Amazon gift card to the first 1000 respondents. No mention of who would be expected to provide said gift cards.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 01/29/2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI - DHHS

<ul style="list-style-type: none"> • Response weighting will be used but may be a point of concern depending on the number and how diverse the respondent population is.
<ul style="list-style-type: none"> • Survey will be translated into French, Spanish, Portuguese, Arabic and Somali – The largest language segments of our immigrant populations • Survey will be curated by VOXCO and translations will be validated by Maine Language Connect. • Interpretation services for languages other than the above, will also be offered by Maine Language Connect as needed. • Initial survey outreach will be by mail. The mailed item will include a link to the survey along with an unique household ID via QR code. • Follow-up outreach will be by SMS, phone, email and other mailings. • An auto-dialer will be used for the phone outreach
<ul style="list-style-type: none"> • No mention of specific security protocols nor HIPAA. Should it be assumed?
<p>D. Data Collection, Analysis, and Reporting</p>
<ul style="list-style-type: none"> • Most of this section is requirement per developed MOU's so no concern at this time. Files will need to be transferred via SFTP. FedRAMP compliance would be preferred for any data storage. Slightly concerned that no security protocols are mentioned.
<ul style="list-style-type: none"> • Response doesn't reflect background nor research in what had been provided in prior years.
<ul style="list-style-type: none"> • Prep work/assistance will be provided only.
<p>E. Representative Group</p>
<ul style="list-style-type: none"> • Limited to 20 participants yet there are 16 counties that should be represented.
<ul style="list-style-type: none"> • Recommend offering \$125 incentive per 90 minute session; however, source of payment is not mentioned. Will this be an added expense or is it built into the quote?
<ul style="list-style-type: none"> • The Joint Standing Committee will have questions. It would be nice to have someone speak for the data source, from the vendor's side, if an applicable question arises.
<p>F. Reports</p>
<ul style="list-style-type: none"> • Not much detail provided beyond a note that the reports will be provided asap. • Same response as above.
<p>2. Staffing</p>
<ul style="list-style-type: none"> • Requirement met. • •
<p>3. Implementation - Work Plan</p>

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 01/29/2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology – OFI - DHHS

- | |
|---|
| <ul style="list-style-type: none">• Minimal response provided. No detail nor plan provided. |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/29/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Group/Dept

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Located in Portland, Maine • 30+ years of experience working on Maine projects • Multiple projects working with Maine people, vulnerable populations
2. Subcontractors	<ul style="list-style-type: none"> • Voxco – out of Canada – risk of data going outside of US • Maine Language Connect – interpretation services
3. Organizational Chart	<ul style="list-style-type: none"> • Only provided small org chart, possibly who will be working on this project?
4. Litigation	<ul style="list-style-type: none"> • None listed
5. Financial Viability	<ul style="list-style-type: none"> • No. submitted tax returns no balance sheets
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/29/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Group/Dept

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • They agreed
<ul style="list-style-type: none"> • They agreed
<ul style="list-style-type: none"> • They agreed
<ul style="list-style-type: none"> • They agreed
B. Communication
<ul style="list-style-type: none"> • They agreed
<ul style="list-style-type: none"> • They agreed
<ul style="list-style-type: none"> • They agreed
<ul style="list-style-type: none"> • They agreed
<ul style="list-style-type: none"> • They agreed
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Will develop a codebook in excel
<ul style="list-style-type: none"> • Will hold an indepth planning meeting
<ul style="list-style-type: none"> • Target of 1000 surveys • Multiple modes of contact including targeted incentives • Want to include gift cards
<ul style="list-style-type: none"> • Will use Voxco for administering the survey • Surveys will be in 5 languages • Phone surveys in other languages can be scheduled
<ul style="list-style-type: none"> • Secure, password protected servers • Removing any links for identifying information
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Will work with the Som to establish the parameters of the data to be shared
<ul style="list-style-type: none"> • Will produce all required reports • Will compile, cleanse, organize all surveys to generate raw data files • Can password protect
<ul style="list-style-type: none"> • Will collaborate with SOM on all important project elements
E. Representative Group
<ul style="list-style-type: none"> • Will offer the opportunity for people to volunteer • Looking for volunteers up to 20 for group
<ul style="list-style-type: none"> • Recommends offering \$125.00 per 90 min session to encourage active participation
<ul style="list-style-type: none"> • PAR will provide any aid required if the group elects to present their report

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/29/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Group/Dept

F. Reports
<ul style="list-style-type: none">• Reports will be submitted by due dates
<ul style="list-style-type: none">• Reports will be submitted by due dates
2. Staffing
<ul style="list-style-type: none">• Included in attachment 7
<ul style="list-style-type: none">• Weekly meetings
<ul style="list-style-type: none">• Included in Attachment 8• No hours provided
3. Implementation - Work Plan
<ul style="list-style-type: none">• Need to meet with SOM first to contract work plan• Plan provided – no specific dates

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • This provider has performed similar work in the past • 30 years experience, dozens of similar projects including 10 parent surveys 8 integrated health service, 3 homeless youth risk, and more than 20 survey and focus groups for FAME and other groups. • 3 project examples provided that reflected ability to complete the request work • Vendor asked for the work and expressed eagerness to start immediate
2. Subcontractors	<ul style="list-style-type: none"> • Voxco - Member of Insights Association, AAPOR, ESOMAR • Maine Language Connect
3. Organizational Chart	<ul style="list-style-type: none"> • Provided, but has only 6 positions. • Blend of PAR, Voxco and Maine Language Connect resources.
4. Litigation	<ul style="list-style-type: none"> • None in last 5 years.
5. Financial Viability	<ul style="list-style-type: none"> • 3 prior year tax returns. Additional information upon request.
6. Certificate of Insurance	<ul style="list-style-type: none"> • Commercial liability companies, and limits on provided certificate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
B. Communication
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
<ul style="list-style-type: none"> • Vendor agreed. No other comments.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Vendor will meet goals of reporting and survey requirements • A code book will be creating or updated for cycle to cycle tracking • Codebooks will be in excel • Methodology referenced details to an association guide for TANF
<ul style="list-style-type: none"> • Strategic plan to define objectives, timelines, responsibilities, reporting guidelines, procedures, and final reports. • Phone, online, and paper forms to support survey activities. • Final approval of online and telephone surveys will be approved by the dept. before any items are printed.
<ul style="list-style-type: none"> • Sampling plan will be created with Dept. guidance • Sampling universe described • Incentives described for survey participation. • Maine.gov Sharepoint site included in the response.
<ul style="list-style-type: none"> • All questions will be translated into multiple languages by Microsoft Azure and reviewed/verified by Maine Language Connect • French, Spanish, Portuguese, Arabic and Somalia and English • On demand translation and interpretation is available • Team will reach out with texts with reminders and surveys, email outreach, phone outreach and mailings.
<ul style="list-style-type: none"> • Identifying information will be removed as it is found and replaced with a system generated identifier.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> All data will be on secure password protected servers hosted by Voxco audited annually by SquarMilner. Current security audit is available. Data will be anonymous Foundation text cited for additional methods.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> Vendor will coordinate with the dept and all related agencies as needed. Secure portal will manage, transfer and store data.
<ul style="list-style-type: none"> Vendor agrees and will comply with this requirement. Available in RTF, Excel and PDF, flat file, tableau or PowerBI Additional reports as requested will be provided with key results and findings
<ul style="list-style-type: none"> Extensive presentation and facilitation experience to support this requirements.
E. Representative Group
<ul style="list-style-type: none"> All survey respondents will be Offered the opportunity volunteer/serve of the RG.
<ul style="list-style-type: none"> Recommends financial compensation \$125 for each 90 minute session
<ul style="list-style-type: none"> Present anonymized data Offered multiple views and drill downs to elaborate key impacts and topics
F. Reports
<ul style="list-style-type: none"> Vendor will submit ASAP and by due dates established
<ul style="list-style-type: none"> Vendor will submit ASAP and by due dates established
2. Staffing
<ul style="list-style-type: none"> Vendor referenced attachment 7 Detail included, Small team.
<ul style="list-style-type: none"> Weekly meetings, progress reports and escalation procedures are in place should issue or questions arise.
<ul style="list-style-type: none"> Referenced attachment 8. Included in attachment 8. Small team.
3. Implementation - Work Plan
<ul style="list-style-type: none"> Ready to begin immediately Timeline not provided. Word table broken out with project/deliverable phases, with resource groups assigned, broken our by quarter and year. Not a realistic or concise plan as requested. Subcontractor work items are identified.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/29/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none"> • In-State • For-profit • Experience with TANF-related projects, including Maine Departments, CDC 	
2. Subcontractors	
<ul style="list-style-type: none"> • Worked with subs previously • Two subs • Voxco – Survey technology • Maine Language Connect – translation and interpretation 	
3. Organizational Chart	
<ul style="list-style-type: none"> • Meets requirement 	
4. Litigation	
<ul style="list-style-type: none"> • None named 	
5. Financial Viability	
<ul style="list-style-type: none"> • Provided PL 	
6. Certificate of Insurance	
<ul style="list-style-type: none"> • Provided 	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/29/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Acknowledged requirement
<ul style="list-style-type: none"> • Acknowledged requirement
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
B. Communication
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Proposed question review process with group of stakeholders • P - Focus on needs of participants as opposed to Federal performance metrics • I – Mentioned working with TANF steering committee for question review process, or creating new committee with DHHS, stakeholders, and themselves – no mention of TANF-recipients being included at this stage • Didn't respond directly to individual items above but acknowledged compliance
<ul style="list-style-type: none"> • Acknowledged, more discussion of methodology in 3 below
<ul style="list-style-type: none"> • Found approximation of current TANF caseload from State online documents • Goal of 1,000 surveys • Initial mailed brochure with description in "multiple languages" • Follow-up with text, phone, email, and additional mailings • \$15 gift card incentives • Weighting the results after-the-fact based on statewide demographic data • Mentioned customer service and more tailored outreach for reminders (less mass reminders)
<ul style="list-style-type: none"> • Recommend French, Spanish, Portuguese, Arabic, and Somali to translate the survey into, offering on the phone translation for any other languages • Unsure about frequency of outreach efforts • Monthly mailing brochures
<ul style="list-style-type: none"> • Meets requirement
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Acknowledged,

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Pan Atlantic Research

DATE: 1/29/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none"> • N - Didn't address legislative report, missing half the scope of work • Limited response to just the survey portion
E. Representative Group
<ul style="list-style-type: none"> • All participants who complete survey will be offered chance to join rep. group • \$125 per 90-minutes for group participation • Hybrid format or fully online • Offering in-person based on need
<ul style="list-style-type: none"> • Recommends bringing in policy expert to explain TANF to group members • Group would accommodate anyone who wants to participate • Work as editor of rep. group report • Q – Working with Department to edit the rep. group report (conflict, potential misunderstanding of rep. group)
F. Reports
<ul style="list-style-type: none"> • Acknowledged • Acknowledged
2. Staffing
<ul style="list-style-type: none"> • Provided • Weekly meetings, Voxco does technical and MLC does translation and survey testing • Unclear about # of FTEs dedicated/how long
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: Feb 14-15, 2023

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none"> • N- All Public Health • N- Consultants • N- Mission-Driven • N- No similar experience 	
2. Subcontractors	
<ul style="list-style-type: none"> • none 	
3. Organizational Chart	
<ul style="list-style-type: none"> • Met Requirements 	
4. Litigation	
<ul style="list-style-type: none"> • None 	
5. Financial Viability	
<ul style="list-style-type: none"> • N-Submitted a letter 	
6. Certificate of Insurance	
<ul style="list-style-type: none"> • Met requirements 	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: Feb 14-15, 2023

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Met Requirements • P - More than Spanish
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Met Requirements
B. Communication
<ul style="list-style-type: none"> • No plan • ED is main POC -- how many other clients?
<ul style="list-style-type: none"> • Met Requirements • N-Notes two weeks? • Smartsheet sounds advanced
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Two business days
<ul style="list-style-type: none"> • Did NOT Meet Requirements
C. TANF and ASPIRE-TANF Participant Survey
<p>ALL Negative</p> <ul style="list-style-type: none"> • Didn't look at the original bill • Typo • MEJ Program guide • CBPP, Urban Institute, but no balance – What about AEI or Hoover Inst • Workgroup?!?
<ul style="list-style-type: none"> • P – sounds fancy
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • P – Paper copy • P - Incentives • N- Survey Boxes – no guarantee of target audience
<ul style="list-style-type: none"> • Met Requirements
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Looked at RFP • Formally request from whom? • Good breakdown
<ul style="list-style-type: none"> • Both too much and not enough
<ul style="list-style-type: none"> • Bidder met requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: Feb 14-15, 2023

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

E. Representative Group
<ul style="list-style-type: none"> • Looked at RFP • N- Confluence of Rep group and survey, Evaluation group
All negative
<ul style="list-style-type: none"> • Honorarium budget? • Fray? Defray? • Recruitment materials? • Charter?
<ul style="list-style-type: none"> • Response indicates lack of understanding of Rep Group duties.
F. Reports
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Met Requirement
2. Staffing
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Met Requirement
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Met Requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 02/13/2024

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I – Founded in 2010 • I – Partners with clients to facilitate data driven decisions • I – History of working with a diverse array of partners to elicit, manage, and integrate divergent opinions. • I – Current DHHS/CDC provider for several engagements. • I – 97 Evaluation contracts for over 138 evaluation projects. • I – Previous experience assisting clients to mee funder and legislative requirements. • I – Project plan tracked in Smartsheets with real-time access. • I – Conducts mixed-methods evaluations (qualitative and quantitative) • I – Provided 3 relevant projects that demonstrated experience with various evaluation methodologies.
2. Subcontractors
<ul style="list-style-type: none"> • I – None stated
3. Organizational Chart
<ul style="list-style-type: none"> • I – Provided, project team not identified
4. Litigation
<ul style="list-style-type: none"> • I – None stated
5. Financial Viability
<ul style="list-style-type: none"> • I – Provided summary via email. Not audited. Difficult to determine viability as current assets is not detailed to show cash balance. Unable to determine ability to meet payroll needs.
6. Certificate of Insurance
<ul style="list-style-type: none"> • I – Provided, expires 08/15/24, Professional Liability of \$1m.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 02/13/2024

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • P – Have experience MaineIT policies and being in compliance. • I – English reviewed by a health literacy expert; other languages culturally and linguistically appropriate.
<ul style="list-style-type: none"> • I – Document sharing platform developed within 6 months
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
B. Communication
<ul style="list-style-type: none"> • I – Ensured communication. • N – Did not specifically address meeting with the department.
<ul style="list-style-type: none"> • I – Will meet with department to develop meeting schedule, but also assumes monthly meetings. • N – Did not address all meeting topics, only Progress Updates.
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • P – Will provide responses within two business days
<ul style="list-style-type: none"> • N – Acknowledges including the Department in communications; Does not acknowledge seeking approval prior to communications. • I – Department will not be included in interviews due to participant confidentiality
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Provided a detailed process on how the survey will be developed. • I – Referenced covering RFP topics, at a minimum • I – Includes a core work group from the Department in development plan
<ul style="list-style-type: none"> • I – Individual Evaluation Plan (IEP) will be developed. • I – IEP will be submitted to USM Office of Research Integrity and Outreach (USM-ORIO) Social Science Institutional Review Board (IRB)
<ul style="list-style-type: none"> • N – Does not address diversity of experience or self-selection bias.. • I – Participants stratified by geographical location.
<ul style="list-style-type: none"> • I – Proposed recruitment strategies include physical survey boxes at offices and CAP agencies and operating a booth at community events. • N – Leverages the State’s interpretation system for other languages than 5 listed. • I – Gifts provided for participation; Gift Cards, Raffle, and reference to eyeglasses with Global Vision

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: Partnerships for Health, LLC

DATE: 02/13/2024

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none"> • N – Does not address biannually, thereafter. • I - Acknowledges adherence to requirement but does not describe how.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • I – Proposes submitting formal requests for data once data sources are identified. • I - Acknowledges adherence to requirement • I - Acknowledges adherence to requirement but does not address timing.
E. Representative Group
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement • N – Meetings to be virtual to reduce structural barriers • I – All participants to receive an honorarium • I – Members selected via application • I - Acknowledges adherence to requirement
F. Reports
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement • I - Acknowledges adherence to requirement
2. Staffing
<ul style="list-style-type: none"> • I – Attachment 7 provided. • I – No subcontractors planned; Will use consultants if needed. • I – Exact composition of team to be determined within 30 days of contract start date. • I – Attachment 8 provided • N – Does not include time allocation of positions
3. Implementation - Work Plan
<ul style="list-style-type: none"> • I – Attachment 9 provided • I – Lori Koban included in plan, listed as an As needed consultant in staffing plan.

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> • I – Provided • I – Includes \$5.8k for mailings to 6323 households assuming 442 returned, \$.93 per household. • I – Includes \$2,710 for survey boxes and community events. • I – Includes \$12.6k for incentives • I – Includes \$3.8k for honorariums

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 15FEB2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology, OFI, DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none">• Provided. Met requirement
2. Subcontractors	<ul style="list-style-type: none">• None listed but USM is referenced as a reviewer?
3. Organizational Chart	<ul style="list-style-type: none">• Provided
4. Litigation	<ul style="list-style-type: none">• None
5. Financial Viability	<ul style="list-style-type: none">• Defer
6. Certificate of Insurance	<ul style="list-style-type: none">• Defer

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 15FEB2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology, OFI, DHHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
• Requirement met
• Requirement met
• Requirement met with options
• Requirement met
B. Communication
• Requirement met
• Requirement met. Thorough.
• Requirement met.
• 2 business days. Requirement met.
• Oddly worded – defer to group
C. TANF and ASPIRE-TANF Participant Survey
• Well laid out plan. No mention of language services
• USM listed for oversight
• Requirement met
• Online and paper options available. Very thorough.
• \$10 gift card – recommendation
• Raffle entry for participants
• Requirement met
D. Data Collection, Analysis, and Reporting
• Well thought out. Impressive.
• Requirement met
• Offers assistance with slides, presentation, and in-person availability to answer questions
E. Representative Group
• Requirement met.
• Will coordinate requirements with dept.
• Requirement met.
• Very thorough
F. Reports
• Mentioned that the above will be met as a minimum
•
2. Staffing
• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 15FEB2024

EVALUATOR NAME: Rainald Gervais III

EVALUATOR DEPARTMENT: Business Technology, OFI, DHHS

<ul style="list-style-type: none">• None provided but mention of
<ul style="list-style-type: none">• Met requirement
3. Implementation - Work Plan
<ul style="list-style-type: none">• Well thought out and detailed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 2/6/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Founded in 2010 • Implemented 97 individual evaluation contracts • 138 individual evaluation projects • Numerous statewide multi-site evaluations and data collection • 35 years combined experience in the team • Provided 3 projects
2. Subcontractors	<ul style="list-style-type: none"> • They do not use subcontractors
3. Organizational Chart	<ul style="list-style-type: none"> • Minimal organizational chart • Program evaluator is missing form org chart
4. Litigation	<ul style="list-style-type: none"> • None listed
5. Financial Viability	<ul style="list-style-type: none"> • Submitted minimal financial statements, referred to CPA
6. Certificate of Insurance	<ul style="list-style-type: none"> • Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 2/6/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Stated they can meet these hours and will honor state holidays, closings.
<ul style="list-style-type: none"> • PFH has worked with the SOM on multiple contracts with DHHS • Strong knowledge of MaineIT Policies • Will ensure public facing materials no higher than 6th/8th grade reading levels. • Will translate documents into other languages
<ul style="list-style-type: none"> • Will create a document sharing program within first 6 months • Will ensure accurate version control.
<ul style="list-style-type: none"> • All native files will be provided to SOM in Word or PDF format.
B. Communication
<ul style="list-style-type: none"> • Executive director will be POC. • Office Manager will assist in scheduling meetings.
<ul style="list-style-type: none"> • Onboarding Meeting • Executive director will be primary POC. • Written agenda 1 week prior • Proven track record of providing timely responses
<ul style="list-style-type: none"> • Will be available via multiple avenues
<ul style="list-style-type: none"> • Will respond within 2 business days
<ul style="list-style-type: none"> • Will include relevant SOM staff members in all communication • Will facilitate discussions to ensure timely and coordinated evaluation efforts
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I am not sure they actually answered this question
<ul style="list-style-type: none"> • Will develop an Individual Evaluation Plan • Will have University evaluate plan for meeting requirements human subjects research criteria. • Never said they would have Department review
<ul style="list-style-type: none"> • Sample will include all 3 groups • They state 6323 participants would be eligible to answer the survey
<ul style="list-style-type: none"> • Met requirements with their response • Want to give incentives plus a raffle • Want to provide eye glasses
<ul style="list-style-type: none"> • Says they will be but does not really state how except for contact details for incentives will be unlinked.
D. Data Collection, Analysis, and Reporting

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 2/6/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none"> • This answer was repeated above • Doesn't state how they will coordinate data sharing and collection just that they reviewed ways to do it. • Will work with department to define data elements
<ul style="list-style-type: none"> • Will create a spreadsheet with tabs for topics • Will meet request to provide by November
<ul style="list-style-type: none"> • Will support the department on presentations to the JSC.
E. Representative Group
<ul style="list-style-type: none"> • Want to establish the group prior to the survey. • Will meet with the department to determine parameters, etc.
<ul style="list-style-type: none"> • Will develop recruitment materials • Create a group charter
<ul style="list-style-type: none"> • Will provide administrative support. • Will help them create a separate roo
F. Reports
<ul style="list-style-type: none"> • Will meet requiremets • Will submit within 15 days
2. Staffing
<ul style="list-style-type: none"> • See attachment 7
<ul style="list-style-type: none"> • They do not plan on using subcontractors but they have a team of consultants as needed.
<ul style="list-style-type: none"> • See attachment 8
3. Implementation - Work Plan
<ul style="list-style-type: none"> • See attachment 9 • Developed with keeping in mind religious holidays, field work when response is low and meeting legislative reporting requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Founded in 2010 • Lengthy list of partners • Full service evaluation agency with 97 evaluation contracts with 138 evaluation projects. • Variety of collection methods: Photovoice, Ripple Effects Mapping, Social Network Analysis, and traditional methods – interviews, surveys and focus groups. • Many CDC initiatives completed along with other projects. • Many commissions completed projects • Health equity lens applied to all approaches
2. Subcontractors	<ul style="list-style-type: none"> • None
3. Organizational Chart	<ul style="list-style-type: none"> • Included. All positions have names resources.
4. Litigation	<ul style="list-style-type: none"> • None
5. Financial Viability	<ul style="list-style-type: none"> • Income statements provided for the period. CPA at Nicholson, Michaud and Nadeau named firm should there be questions.
6. Certificate of Insurance	<ul style="list-style-type: none"> • Certificate provide. Includes policy details, types and limits included except for auto.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor confirms and will comply with requirement.
<ul style="list-style-type: none"> • Vendor will comply with this requirement and policies. • Current and prior work indicates compliance • Cultural and linguistic appropriateness is ensured.
<ul style="list-style-type: none"> • Data sharing platform will be developed and maintained within 6 months of contract start.
<ul style="list-style-type: none"> • All documentation will be provided in MS Word and PDF. All native files will be provided to the Dept.
B. Communication
<ul style="list-style-type: none"> • Vendor confirmed this requirement will be met.
<ul style="list-style-type: none"> • Proven track record of timely responses to the Dept. • Vendor will comply with requirement in a collaborative manner and meet regularly using a variety of methods.
<ul style="list-style-type: none"> • Vendor confirmed the requirements.
<ul style="list-style-type: none"> • Vendor confirmed requirements and assured timely responses within 2 business days.
<ul style="list-style-type: none"> • Vendor restated and confirmed the requirements.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Vendor provided a list of experiences and reference a number of reports provided with website content data published. • Vendor provided a step by step detailed narrative how to complete the task for the dept.
<ul style="list-style-type: none"> • Vendor will develop an Individual Evaluation Plan that will detail questions, recruitment, data collection and analysis methods reviewed by the dept.
<ul style="list-style-type: none"> • Vendor will sample named groups.
<ul style="list-style-type: none"> • Vendor response was lengthy, included photos and was very details. • Compensation included raffles, gift cards and eyeglasses • Collection methods included physical survey collection boxes, email, text, community events, mail and completed surveys could be submitted electronically, paper, interview or phone with interpretation support in 5 languages.
<ul style="list-style-type: none"> • All surveys will be anonymous
D. Data Collection, Analysis, and Reporting

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • Vendor cited other documentation and statute for data collection • Significant list of specific data elements and criteria were included and noted the agency that held the data needed to partner with
<ul style="list-style-type: none"> • Vendor will provide workbook November 2024 and create the report for review. QA processes are aimed at continuous improvement.
<ul style="list-style-type: none"> • Vendor will support the department presentations and reports with in person attendance as needed to respond to questions.
E. Representative Group
<ul style="list-style-type: none"> • Proposed 10-15 members to serve 16 months meeting quarterly.
<ul style="list-style-type: none"> • Vendor will invite with an application. Meetings will be electronic. Roles, responsibilities and objectives will be provided in advance.
<ul style="list-style-type: none"> •
F. Reports
<ul style="list-style-type: none"> • Vendor will comply and deliver. Also include Rep. Group activity report, charter, agenda and findings.
<ul style="list-style-type: none"> • Vendor will comply.
2. Staffing
<ul style="list-style-type: none"> • Included in attachment 7.
<ul style="list-style-type: none"> • No subcontractors. Staffing plan included.
<ul style="list-style-type: none"> • Completed and included.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Plan is very granular and details with all timelines displayed, resources and start finish dates.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 2/7/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS - OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Maine-based• For-profit• Experience with a wide range of organization types, include Maine gov• Experience mostly health-focused• Experience with diverse linguistic and cultural populations
2. Subcontractors
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• Provided
4. Litigation
<ul style="list-style-type: none">• None listed
5. Financial Viability
<ul style="list-style-type: none">• Provided
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 2/7/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS - OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Review of reading materials by external health literacy expert • Review of materials in Arabic, Somali, French, Spanish for cultural/linguistic appropriateness
<ul style="list-style-type: none"> • Six-month timeline seems long
<ul style="list-style-type: none"> • Meets requirement
B. Communication
<ul style="list-style-type: none"> • Exec Director is primary contact • Meets requirement
<ul style="list-style-type: none"> • Will maintain online workplan for Department to track progress
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Outlined reading/policy research conducted while responding to RFP, comprehensive • Thorough process for developing the survey. Doesn't pre-define length etc. Ground-up approach. • Timeline for survey development may be long • Strong emphasis on cultural and linguistic review, e.g. involving ECBO in survey development and review process
<ul style="list-style-type: none"> • Planning to submit to USM-Office of Research Social Science Institutional Review Board for review before dissemination
<ul style="list-style-type: none"> • May conduct weighted sampling of former participants, depending on response • Paper survey distributed at DHHS office locations • Reminder email sent two weeks after initial email • Will mail all recipients the survey with self-address envelope • Attending community events where they expect a lot of TANF recipients to be in order to hand out survey, booth or information table • Using SurveyMonkey, paper version • Arabic, English, French, Spanish, Somali available for paper survey only • Option to complete survey through interview • Alternate languages included in "survey boxes" distributed to DHHS locations

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Partnerships for Health, LLC

DATE: 2/7/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS - OFI

<ul style="list-style-type: none"> • State’s interpretation system used for interviews • Proposed gift for survey completion with past examples, will decide with Department upon award, e.g. gift cards, raffle, eye glasses (?), tank of heating oil
<ul style="list-style-type: none"> • Meets requirement
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • P - Reviewed original LIFT report before completing bid • Detailed outline of LIFT data
<ul style="list-style-type: none"> • Meets requirement • Mentioned submitted LIFT report for literacy review • Ongoing process of refinement for LIFT report year over year
<ul style="list-style-type: none"> • Meets requirement
E. Representative Group
<ul style="list-style-type: none"> • Proposes getting rep group together before evaluation workgroup so they can participate in both • Discussed attention to power dynamics within rep group
<ul style="list-style-type: none"> • Proposes compensation for rep group members • Solicit participation in rep group from entire eligible population through application process
<ul style="list-style-type: none"> • Includes educational component in rep group meetings on survey design and data interpretation • Scope of rep group includes review of evaluation activities, feedback on TANF program, and review of LIFT report data (“at least two” meetings about LIFT report data) • A little thin on info about how the rep group will be supported presenting their report to the legislature
F. Reports
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
2. Staffing
<ul style="list-style-type: none"> • Provided
<ul style="list-style-type: none"> • No subs
<ul style="list-style-type: none"> • Unclear how many FTEs dedicated • Some consultants used
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none">• Extensive Maine and TANF experience• TANF Survey experience – CO• Typo - Megan.Scott@main.gov
2. Subcontractors	<ul style="list-style-type: none">• None
3. Organizational Chart	<ul style="list-style-type: none">• Met Requirement
4. Litigation	<ul style="list-style-type: none">• Disclosed
5. Financial Viability	<ul style="list-style-type: none">• Met Requirement
6. Certificate of Insurance	<ul style="list-style-type: none">• Expired?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Met Requirement
B. Communication
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Not sure the standard project management approach fits this project perfectly.
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Met Requirement
<ul style="list-style-type: none"> • Did not meet requirement – focused on a communication plan rather than pre-approval.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Mentioned LIFT, but did not mention the Claxton Bill • Excellent survey suggestions • Great plan, but I worry about over-surveying folks in a monthly cycle
<ul style="list-style-type: none"> • Typo (3) in header • Went above and beyond with the commitment
<ul style="list-style-type: none"> • A lot resting on the monthly cycle • Strategy is well-thought out and demonstrates familiarity with Maine
<ul style="list-style-type: none"> • N – English, French and Spanish? • Utilize states translation services • No paper?
<ul style="list-style-type: none"> • Met Requirements
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Engaging Narratives? • Integrating the data is intriguing, but concerning • P – District Fact Sheets
<ul style="list-style-type: none"> • Met Requirements
E. Representative Group
<ul style="list-style-type: none"> • Met Requirements plus put some thought into the response
<ul style="list-style-type: none"> • Good response
<ul style="list-style-type: none"> • Ensure that they aren't talking down to group – infographics and briefs

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• Bidder understood what Department wants in support for group; good balance
F. Reports
<ul style="list-style-type: none">• Met Requirements
<ul style="list-style-type: none">• Met Requirements
2. Staffing
<ul style="list-style-type: none">• Met Requirements
<ul style="list-style-type: none">• N/A
<ul style="list-style-type: none">• Met Requirements
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met Requirements• Interpretation services pass cost directly to Maine

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 02/14/2024

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • I - Founded in 1986 • I - Headquartered in Boston, MA • I - Dedicated to serving the public sector for more than 35 years • P – Have assisted more than half of the states with TANF program. • P – Provided services to Maine for nearly 20 years • N – “Office of Financial Independence” referenced instead of Office for Family Independence. • P – Experience surveying TANF recipients to measure outcomes and program satisfaction • P – Conduct “leaver” surveys since 2021 in Colorado. • I – Provided three relevant projects
2. Subcontractors
<ul style="list-style-type: none"> • I – None
3. Organizational Chart
<ul style="list-style-type: none"> • I – Provided with project team identified.
4. Litigation
<ul style="list-style-type: none"> • I – 18 cases disclosed, most closed.
5. Financial Viability
<ul style="list-style-type: none"> • I – Provided, appear for to be financially viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • I – Provided, Expired 04/01/2023, Professional/Cyber Liability of \$10,000,000

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 02/14/2024

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
B. Communication
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • I – Project management methodology based on four fundamental objectives; Effective Communication, Dynamic Project Management, Proactive Quality Management, and Comprehensive Risk Management
<ul style="list-style-type: none"> • I – Project plan to be finalized during kick-off meeting
<ul style="list-style-type: none"> • I – Status meetings to be held virtually
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement, but focus on materials related to the survey and Representative Group.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • P – Core set of questions for all and second set of questions for ASPIRE-TANF population
<ul style="list-style-type: none"> • P – Experience in service gap assessments and trauma-informed interviewing
<ul style="list-style-type: none"> • I – Recommend adding questions about employment & employment outcomes.
<ul style="list-style-type: none"> • I – Cognitive interviews to test questions before distribution
<ul style="list-style-type: none"> • I – Propose continual monthly surveys
<ul style="list-style-type: none"> • P – Tailored questions; people answer questions relative to experience
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • P – Provided a robust and detailed response demonstrating a deep knowledge of Maine’s TANF program and characteristics.
<ul style="list-style-type: none"> • P – Capture household type and district offices to further diversity of experience
<ul style="list-style-type: none"> • I – Self-reported demographics, intersectional-identity weighting, and ample open-response questions to address diversity of experience
<ul style="list-style-type: none"> • I – Random Sampling, Weighting, and incentives to address self-selection bias.
<ul style="list-style-type: none"> • I – Utilizes Qualtrics as survey instrument
<ul style="list-style-type: none"> • I – Mailed paper surveys to those without email or phone numbers

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 02/14/2024

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human services - CO

<ul style="list-style-type: none"> • I – Day and time of invitations impact response rate, Wed @ 6 pm. • I – Will provide English, French, and Spanish. Will utilize the State's translation and interpretation services for other languages • I – Provide opportunity to take survey orally
<ul style="list-style-type: none"> • I – HIPAA compliant platform • I – Will provide SOC2 certificate, if requested
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • P – Provided a 13 bullet detailed response • I – Semi-annual presentations to stakeholders selected by Department • I – Propose District Office Fact Sheets to complement the biannual reports
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
E. Representative Group
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement • I – Discuss incentive as an add-on
<ul style="list-style-type: none"> • I – Virtual or in person • P – Interpreters, multi-lingual communications, and 508 compliant
<ul style="list-style-type: none"> • I – Meet every 6 months to support creation of separate report • I – Provided detailed and thorough support for group to present to committee.
F. Reports
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to requirement
2. Staffing
<ul style="list-style-type: none"> • I – Attachment 7 provided
<ul style="list-style-type: none"> • I - None proposed
<ul style="list-style-type: none"> • I - Attachment 8 provided
3. Implementation - Work Plan
<ul style="list-style-type: none"> • I - Attachment 9 provided

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> • I – Provided • I – Includes \$24.5k for survey translation for French & Spanish, Qualtrics license & IT, Mailings, and Gift Cards for Cognitive Interviews and Survey completion • I – Includes \$5.9k for travel

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: Mar 10, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: OFI/DHHS/SOM

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • PCG is based out of Boston • Active working relationship with SOM/DHHS • Has experience with working with the TANF population in Maine • Has 20 years of experience supporting state and county-run TANF programs • Completed a project with SOM where they assisted in identifying 2 parent households • Assisted SOM TANF with determining the authenticity of the of the TANF WPR • 20 years experience with data analysis techniques including data weighting, factor analysis, and predictive analysis. • Proven success in Maine with the development and implementation of the Maine Young Adult Survey (YAS)
2. Subcontractors
<ul style="list-style-type: none"> • No subcontractors listed
3. Organizational Chart
<ul style="list-style-type: none"> • Provided with both Senior Leadership and the project team
4. Litigation
<ul style="list-style-type: none"> • Several instances provided; although, none are in Maine.
5. Financial Viability
<ul style="list-style-type: none"> • Defer to panel specialist
6. Certificate of Insurance
<ul style="list-style-type: none"> • Defer to panel specialist

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: Mar 10, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: OFI/DHHS/SOM

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Requirement met
<ul style="list-style-type: none"> • Prior projects have proven that this should not be a concern
<ul style="list-style-type: none"> • Requirement met and method detailed
<ul style="list-style-type: none"> • Requirement met
B. Communication
<ul style="list-style-type: none"> • Available for for in person meetings as needed • Write-up portrays their understanding of the process • Requirement met
<ul style="list-style-type: none"> • Very well thought out. • Includes plans for: <ul style="list-style-type: none"> - Project Initiation / Planning - Execution - Monitoring - Closing • Top score warranted
<ul style="list-style-type: none"> • All venues covered. No concerns
<ul style="list-style-type: none"> • Requirement met
<ul style="list-style-type: none"> • Requirement met
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Exhibited knowledge of the TANF population in Maine and that they they have done their research in the work that will be needed. • Mentioned offering incentives but who will cover the expense? Unknown if this is in the proposed budget • Survey questions will be customized to current and prior participant responses with branching survey logic
<ul style="list-style-type: none"> • Misnumbered. • Does not currently exists. Strategy is to customize tactics after first meeting with OFI.
<ul style="list-style-type: none"> • Proposes using a stratified random sampling along several axes: <ul style="list-style-type: none"> - Exemption Status – Participation in APSIRE or only TANF - Program Status – Current or former participant - Household Type – One-parent, Two-parent, or other - Geographic location – DHHS District office

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: Mar 10, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: OFI/DHHS/SOM

<ul style="list-style-type: none"> • Response took into account the geographic diversity of the Maine TANF participant make-up • I -“PCG will harness detailed case information to shed light on specific case scenarios”... how so? From where and how? • Normal 95% CI mentioned • Will employ response weighting strategies • Effort will be made to ensure that a wide swath of ‘intersectional identities’ are represented
<ul style="list-style-type: none"> • Will provide the survey in French, English and Spanish. What about Lingala, Samali,...? • Plan to utilize the State’s translation and interpretation service for other language support... who will cover these expenses as the state is charge per instance • Multi-modal – Print, online and verbal options available • Qualtrics will be used as the primary survey instrument • SMS Text messages will be utilized when/where authorized • SOCT2 certificatified
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Data will be shared via SFTP and stored using a SOC-2 secure environment for further analysis.
<ul style="list-style-type: none"> • Responses will be cleansed of all identifiable information • Appear to understand that the survey and LIFT report items are separate •
E. Representative Group
<ul style="list-style-type: none"> • Ready and available to assist
<ul style="list-style-type: none"> • Plan to offer incentives • Will keep a group small at 10-15 individuals from different backgrounds , experiences and geographic locations
<ul style="list-style-type: none"> • Requirement met • Understanding relayed
F. Reports
<ul style="list-style-type: none"> • Requirement met
<ul style="list-style-type: none"> • Requirement met
2. Staffing
<ul style="list-style-type: none"> • Provided at both the position level and also, who they have lined up to play the role
<ul style="list-style-type: none"> • n/a

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: Mar 10, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: OFI/DHHS/SOM

- Was a plan provided?
- Noted hours for leads appear to be very low...
- Will a 2 person team be adequate for this work? - I am concerned that not enough emphasis is placed on the manning needed to complete the work

3. Implementation - Work Plan

- Despite exhibition of prior knowledge that the survey, LIFT and representative groups are separate, the work plan does not portray this same understanding. The work plan groups the survey and LIFT items as being the same part?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 2/23/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Founded in 1986 • HQ in Boston, MA • Extensive experience with TANF • Providing support to DHHS for almost 2 decades
2. Subcontractors	<ul style="list-style-type: none"> • None
3. Organizational Chart	<ul style="list-style-type: none"> • Provided overview, kind of short
4. Litigation	<ul style="list-style-type: none"> • Listed quite a few either dismissed or pending
5. Financial Viability	<ul style="list-style-type: none"> • Appear financially viable
6. Certificate of Insurance	<ul style="list-style-type: none"> • Yes, provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 2/23/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Met requirement
<ul style="list-style-type: none"> • Will work with their IT Team to meet State of Maine IT Policies • Will endeavor to maintain a 6th grade reading level – use their own writers
<ul style="list-style-type: none"> • Can provide via the desired medium
<ul style="list-style-type: none"> • All material shall belong to the Department
B. Communication
<ul style="list-style-type: none"> • Will meet as requested, either remote, or in person
<ul style="list-style-type: none"> • Will use their proven management approach to collaborate on this project. • Will host kick off meeting to review plan, structure and goals. • Expressed in some detail about how this would be met.
<ul style="list-style-type: none"> • Can communicate via any avenue that meets requirements.
<ul style="list-style-type: none"> • Will meet this requirement.
<ul style="list-style-type: none"> • Will work with the Department to obtain approval for all communication materials and the representative group.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Will develop survey based on their experience with TANF participant surveys • Will develop questions through 2 rounds of review • Will create an additional set of questions specific to Aspire participants • Will offer an incentive to complete the survey • Will develop relevant questions based on who is taking the survey
<ul style="list-style-type: none"> • Will develop a comprehensive plan • Will seek out department approval before implementation
<ul style="list-style-type: none"> • Will base a random sampling on 4 factors – exemption status, program status, household type and geographic location • Propose sampling at the DHHS district office level – spread out across the State of Maine • They will oversample low population groups • They will sample monthly to be represent low population groups • Will use random sampling, weighting and incentives
<ul style="list-style-type: none"> • Will collect survey data each month starting July 2024 • Use Qualtrics for the survey platform • Can provide survey orally

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 2/23/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none"> • Only addresses English, French and Spanish, missing a lot of the Maine population
<ul style="list-style-type: none"> • Qualtrics is a secure platform – HIPAA standard, Soc2 certification. • Data will be scrubbed before sending back to DHHS • All data can be transferred using SFTP servers.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Use a secure FTP server • SOC 2 environment
<ul style="list-style-type: none"> • Will provide progress reports within 15 days after the end of each quarter • The first report will cover July through October 2024 – will be delivered by December 1, 2024
<ul style="list-style-type: none"> • Will work with Department to facilitate the reports for the JSC.
E. Representative Group
<ul style="list-style-type: none"> • Will work with Department to identify a group of 10 to 15 individuals • Would like to offer incentives to enhance recruitment
<ul style="list-style-type: none"> • Recommends meeting every 6 months • Will provide clear communication channels • Will provide agendas and materials
<ul style="list-style-type: none"> • Will allow them to meet as often as every 6 month period? • Will provide support to present their report
F. Reports
<ul style="list-style-type: none"> • Will meet requirements
<ul style="list-style-type: none"> • Will meet requirements
2. Staffing
<ul style="list-style-type: none"> • Provided in attachment 7
<ul style="list-style-type: none"> • None
<ul style="list-style-type: none"> • Provided in attachment 8
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided in attachment 9

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Founded in 1986 in Boston MA • Exclusively service government entities and public health sector • Familiar with legal/statutory requirements • Similar project completed for other TANF programs • Provided services in all 50 states w/ deep experience in Maine including OFI, OCFS, CDC teams and MeGeneral. • Illustration of services for many different kinds of services including TANF • Multiple states served • 12+ pages of graphics, charts and description of services provided. • Project detail included Maine efforts
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Detailed, visibly pleasing chart provided. • Multi-tiered org with resources named for each position.
4. Litigation
<ul style="list-style-type: none"> • Appeal pending settlement re: marijuana licensing review process. • Employee claimed forged signature. Case dismissed 8/2020. • Appeal re: state contract to replace incumbent. Dismissed 2018. • Enrollment issue in NY. Dismissed in 2020. • HR re: unemployment. Dismissed 2019 • HR re: unpaid sick leave at termination. Open and pending. • HR re: religious discrimination settled 9/2023 • HR re: disability discrimination: pending.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none">• Denial of claims – Pending• HR discrimination –Resolve 2/2023.• Many more.• Note taker making note of employee treatment resulting in litigation is interesting.
5. Financial Viability
<ul style="list-style-type: none">• Financial statements provided• Independent auditor reports from PKF oConnor Davies• Year 2020-2023
6. Certificate of Insurance
<ul style="list-style-type: none">• Provide• Types, amounts and limits provided for all types.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor confirmed requirement + as needed support
<ul style="list-style-type: none"> • Vendor will comply
<ul style="list-style-type: none"> • Vendor will comply. • Multiple methods and tools. • Data will be shared with the dept.
<ul style="list-style-type: none"> • Vendor complies with the requirement.
B. Communication
<ul style="list-style-type: none"> • Vendor will comply with the requirement as needed electronically or in person.
<ul style="list-style-type: none"> • Vendor provided detailed, project management approach to fulfill this requirement.
<ul style="list-style-type: none"> • Vendor conducts remote work and will be available for on site work as needed. • Vendor will comply with method best suited for DHHS/OFI
<ul style="list-style-type: none"> • Vendor confirmed and will comply with this requirement.
<ul style="list-style-type: none"> • Vendor will work with the dept at all phases and in close coordination
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Vendor confirmed the requirement with historical knowledge of the program and legislative requirement. • Vendor provided a lengthy, detailed response with graphics describing the approach and deliverables to fulfill the scope of this RFP.
<ul style="list-style-type: none"> • Vendor altered the numbering convention for this item. • This question is labelled "3" in the response. • The section is missing but appears to be address with necessary detail as part of the priori requirement.
<ul style="list-style-type: none"> • Mislabeled in the response as Item 4. • Detailed response appears to meet all requirements in this section and is veriy detailed. Includes graphics.
<ul style="list-style-type: none"> • Labelled as 5 in the respohnse. • Method are provided and are detailed. • Tools iused to support requirement named – Qualtrics • Lengthy response with many details.
<ul style="list-style-type: none"> • Question label and numbering is missing. Item 5 in the response is the next questions.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • PII addressed, but format made it difficult to verify the response to the requirement.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Vendor described methods of sharing data and will store is a SOC2 secure environment.
<ul style="list-style-type: none"> • Process described from kickoff to delivery in detail. • Many pages + graphic
<ul style="list-style-type: none"> • Vendor will collaborate and comply with this requirement and submission schedule.
E. Representative Group
<ul style="list-style-type: none"> • Vendor recommended incentive for participation
<ul style="list-style-type: none"> • Vendor described how they would comply with this requirement in detail.
<ul style="list-style-type: none"> • Vendor agrees and will comply with this requirement • Vendor available for support and delivery to the committee
F. Reports
<ul style="list-style-type: none"> • Reports will be submitted and vendor will accept any revisions needed. • Vendor will comply with the requirement.
2. Staffing
<ul style="list-style-type: none"> • Included in attachment 7
<ul style="list-style-type: none"> • No contractors.
<ul style="list-style-type: none"> • Included in attachment 8 • Job descriptions, titles and tasks.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • 9Included in attachment 9 • Colorful overview with timelines that spanned each month with a breakout of each work area from kickoff to delivery.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 2/21/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • For-profit • Out-of-state (Mass) • OFI and TANF experience • Very large org
2. Subcontractors	<ul style="list-style-type: none"> • No subs
3. Organizational Chart	<ul style="list-style-type: none"> • Provided
4. Litigation	<ul style="list-style-type: none"> • Long and varied list of litigation
5. Financial Viability	<ul style="list-style-type: none"> • Provided
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Public Consulting Group LLC

DATE: 2/21/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Didn't address process for ensuring reading level guidelines
<ul style="list-style-type: none"> • Acknowledged requirement
<ul style="list-style-type: none"> • Acknowledged requirement
B. Communication
<ul style="list-style-type: none"> • Acknowledged requirement
<ul style="list-style-type: none"> • Intensive project-management approach to meetings with the Department, guided by Project Manager
<ul style="list-style-type: none"> • Initial meeting includes discussion of access to necessary data
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I - Copy-pasted text from OFI website • Quoted LIFT legislation • Two rounds of review after questions are created, unclear about review process, who is reviewing, etc. • Suggested additional survey questions around immigrant populations and employment outcomes • Included background research, light on process information • Proposed 10 "cognitive interviews" – unfamiliar with this term and unclear about process of interview • Unclear how participants will be selected to review survey questions • I – Proposed continual monthly survey • Annual review of survey for necessary revisions, to include rep group • Proposed incentives • Branching logic to provide questions based on program enrollment. Also mentioned branching based on answers to demographic questions
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Sampling methodology shows knowledge of TANF policy • Suggested oversampling under-represented groups and gave residents of rural counties as an example • Groups to over-sample showed knowledge of TANF policy

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Public Consulting Group LLC

DATE: 2/21/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none"> • Weighting for race/ethnicity/national origin based on demographic responses within survey (multi-lingual strategies outlined below) • Thorough answer to issue of self-selection bias
<ul style="list-style-type: none"> • Monthly data transfer to bidder, requires additional case data to implement sampling strategy • Text invitations to survey • One reminder per participant a week after initial invitation to complete survey • Translated surveys and invitations in French and Spanish • Surveys sent out specifically upon program exit • 6pm on Wednesdays survey will be sent out • Using State's translation services
<ul style="list-style-type: none"> • Meets requirement • Qualtrics
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Didn't address data analysis or mandatory legislative report (but quoted governing legislation in previous section)
<ul style="list-style-type: none"> • Unclear if this section includes the full scope of work
E. Representative Group
<ul style="list-style-type: none"> • 10-15 individuals • Proposed Department develop recruitment strategy for rep group • Working with current ASPIRE vendor • Same incentive options proposed as for survey completion
<ul style="list-style-type: none"> • Group will provide input on survey process in real time • Meet every six months
<ul style="list-style-type: none"> • Meets requirement
F. Reports
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
2. Staffing
<ul style="list-style-type: none"> • Provided
<ul style="list-style-type: none"> • None proposed
<ul style="list-style-type: none"> • 1,396.85 hours (0.67FTE), seems very low for proposed services, e.g on-going monthly surveys and continuous survey revision
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Writing could be improved • Chamber of Commerce research project – not the same • Assessing and MIS – not the same • Ingesting Data – not the same
2. Subcontractors	<ul style="list-style-type: none"> • N/A
3. Organizational Chart	<ul style="list-style-type: none"> • Met Requirements • Significant top-heavy structure
4. Litigation	<ul style="list-style-type: none"> • None disclosed
5. Financial Viability	<ul style="list-style-type: none"> • Three written paragraphs • Work in Maine? • \$67 million in revenue?
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Long hours
<ul style="list-style-type: none"> • Rampant typos
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Met Requirements
B. Communication
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Typo
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Not the comms director, but generally okay response
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Empathize? Scamper?
<ul style="list-style-type: none"> • N - Rep group involved in survey development
<ul style="list-style-type: none"> • Governance and Advisory Board – extremely cumbersome, unnecessary, and demonstrates lack of awareness
<ul style="list-style-type: none"> • Certainly expanded on the yes/no question, but did they answer it?
<ul style="list-style-type: none"> • No confidence % or numbers or margin of error
<ul style="list-style-type: none"> • Accounts for self-selection bias, but how?
<ul style="list-style-type: none"> • Completely insufficient response
<ul style="list-style-type: none"> • Met Requirements
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Typo
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Met Requirements
E. Representative Group
<ul style="list-style-type: none"> • A group to select the group
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • NO – not folding in this to the LIFT report.
F. Reports
<ul style="list-style-type: none"> • Met Requirements
<ul style="list-style-type: none"> • Met Requirements
2. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• Met Requirements
<ul style="list-style-type: none">• N/A
<ul style="list-style-type: none">• Met Requirements
3. Implementation - Work Plan
<ul style="list-style-type: none">• Very difficult to read attachment 9

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 02/15/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • I - Began in 2008 as KSM, became Resultant in 2021 • I – Headquartered in Indianapolis, IN • I – 15-year history
2. Subcontractors	<ul style="list-style-type: none"> • I - None
3. Organizational Chart	<ul style="list-style-type: none"> • I – Provided, unclear how project team fits in with larger organization. • I – Project team identified as roles without names.
4. Litigation	<ul style="list-style-type: none"> • I - None
5. Financial Viability	<ul style="list-style-type: none"> • I – Subsidiary of RCKC Acquisitions • N – Audited financial not provided • I – State they are financially secure • I – Will share financials upon execution of a Non-Disclosure Agreement
6. Certificate of Insurance	<ul style="list-style-type: none"> • I – Provided, Expires 03/29/24, Umbrella Liability \$10m

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 02/15/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to these requirements • I – Qualtrics recommended • I – Will involve the agency’s “social media officer” if needed • I – Flesch-Kincaid Grade Level percentage
<ul style="list-style-type: none"> • I - Qualtrics hosted on IBM cloud, can be transferred to department at any time • I – GDPR, HITRUST, ISO 27001, and FedRAMP compliant
<ul style="list-style-type: none"> • I – Acknowledging transferring the entire environment to the department, rather than copies of the materials produced.
B. Communication
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement.
<ul style="list-style-type: none"> • I – Communication plan laying out cadence of all meetings • I – Provided table of suggested frequency, but left the Attendees column on table blank
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement.
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement.
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Acknowledge adherence to a through h. • I - Provided detailed approach to survey development. • I – Propose development of Governance Steering Committee including representative from DOL and DAFS Bureau of Revenue Service. • I – Propose development of Advisory Board including members from DOL, DAFS, Bureau of Revenue Services, The Representative Group, and additional stakeholders.
<ul style="list-style-type: none"> • I – TAPS acronym • N – Paragraph speaking to identifying teachers and educators and “representative sample of educators across the state”. • N – DHHS information technology staff survey emails are not caught in spam filters
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement.
<ul style="list-style-type: none"> • I – States they will work with Department to “ensure there is a mechanism for respondents to respond with reasonable accommodations”

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 02/15/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

- N – Does not acknowledge 2024, biannually thereafter, or modes of survey access.

- I – Acknowledge adherence to this requirement.

D. Data Collection, Analysis, and Reporting

- I – Acknowledge adherence to this requirement.

- I – Propose completion of data sharing agreement.

- I – acknowledges providing reports and predetermined reports and agreed upon cadence.

- I – Acknowledges department retains editing “writes”.

- N – Does not acknowledge 12/1/24 deadline, CY2024, or biannually thereafter.

- N – Does not acknowledge data interpretation.

- I – Acknowledge adherence to this requirement.

E. Representative Group

- I – Acknowledge adherence to this requirement.

- I – Acknowledge adherence to this requirement.

- I – Will collect feedback from group to provide to the department.

- N – Did not acknowledge assisting group to create their own report.

- I – Will work with group to add their report to the department’s report.

F. Reports

- I – Acknowledge adherence to this requirement, in a vague response.

- I – Acknowledge adherence to this requirement.

- I – Recommend weekly reports instead of quarterly.

2. Staffing

- I – Attachment 7 provided

- N – Did not include minimum qualifications.

- I – Stated none for this project

- I – Attachment 8 provided

- I - .6 FTE

3. Implementation - Work Plan

- I – Attachment 9 provided

- N – Does not include the person or position responsible for each task.

Part IV, Section IV. Cost Proposal

- I – Provided

- I – Does not match hours in staffing plan; Engagement Manager 215 vs 193, Business Analyst 431 vs 387, Data Analyst 340 vs 305, Data Engineer 286 vs 257.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 02/15/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

- | |
|---|
| <ul style="list-style-type: none">• I - Qualtrics Subscription - \$46,725 |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: Feb 22, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Been in business for 15 years• No direct TANF experience• Located out of Indianapolis
2. Subcontractors
<ul style="list-style-type: none">• None listed
3. Organizational Chart
<ul style="list-style-type: none">• No individuals named but minimum chart provided
4. Litigation
<ul style="list-style-type: none">• None listed
5. Financial Viability
<ul style="list-style-type: none">• Available after signing an NDA
6. Certificate of Insurance
<ul style="list-style-type: none">• Exists and is current

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: Feb 22, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Requirement exceeds expectations Will be available from 6AM – 7PM ET
<ul style="list-style-type: none"> Plan to use Qualtrics – Requirement met Specifically notes use of the “Flesch-Kincaid Grade Level” to evaluate grade level scale/score for survey
<ul style="list-style-type: none"> Not answered.
<ul style="list-style-type: none"> Does not appear that the vendor understands the LIFT requirement of the RFP. Mentions that all survey materials will be available but no mention of other materials.
B. Communication
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Tentative meeting plan provided – requirement met
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met... mentions conferring with the Department’s Director of Communications but I’m sure we’ll work that out States that all policies and procedures will be followed related to the release of external communications
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> Mentions availability of interpretation and translation services but doesn’t go into detail on what languages may be covered/included Appears to have mostly just copied/reworded the points in the question I like the design thinking approach diagram they provided Governance Steering committee plans are solid but the Advisory Board may be a bit out of reach
<ul style="list-style-type: none"> Indicates noted effort in learning about the TANF population and guidelines that are required for the survey. Not sure why they are bringing Teachers and Administrators into the fold... Survey related email will be provided and responses received within 24 hours
<ul style="list-style-type: none"> Adamantly explains their understanding of survey sources of error. Will strive to ensure that there is no selection bias in play No mention of response weighting
<ul style="list-style-type: none"> Heavy reliance on Qualtrics

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: Feb 22, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

<ul style="list-style-type: none"> Minimal response
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Appears to have understood the assignment in that the CFES Data and the Survey are separate tasks
<ul style="list-style-type: none"> Requirement met
E. Representative Group
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> ... no mention on how but states they will convene a group after consulting with the 'stakeholders'.
<ul style="list-style-type: none"> Appears that they understand the task
F. Reports
<ul style="list-style-type: none"> I really like the structure of their reporting plan. It is very well thought out.
<ul style="list-style-type: none"> Recommends providing progress reports on a weekly as opposed quarterly basis
2. Staffing
<ul style="list-style-type: none"> Team of 4 provided: <ul style="list-style-type: none"> - Engagement Manager / Project Lead - Business Analyst - Data Analyst - Data Engineer
<ul style="list-style-type: none"> N/a
<ul style="list-style-type: none"> Unsure if staffing plan will adequately meet the demands for this project.
<ul style="list-style-type: none"> Q – Who will administer the survey, focus group, and also put together
3. Implementation - Work Plan
<ul style="list-style-type: none"> Very tight timeline with start as of 3/1. Concern that they will have enough time to put a quality team together with such short notice. There is a chance that we may not have this awarded by the end of Feb 2024.
<ul style="list-style-type: none"> Work plan is only for the Survey portion of the request. No mention of the LIFT report work.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 2/25/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Started in 2008 • Research and Data company • Provided 3 projects, none pertain to RFP
2. Subcontractors	<ul style="list-style-type: none"> • None
3. Organizational Chart	<ul style="list-style-type: none"> • Provided upper level and project level
4. Litigation	<ul style="list-style-type: none"> • None
5. Financial Viability	<ul style="list-style-type: none"> • Did not include, requires an NDA
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided, expires soon

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 2/25/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Can meet this requirement
<ul style="list-style-type: none"> • Will meet and comply
<ul style="list-style-type: none"> • Listed out exactly how they will meet each policy and their take on the policy
<ul style="list-style-type: none"> • Will use Qualtrics as the hosting environment
<ul style="list-style-type: none"> • Entire environment can be transferred to the Department
B. Communication
<ul style="list-style-type: none"> • They are able to meet at any agreed time
<ul style="list-style-type: none"> • Provided a chart for their suggestions on meetings for each subject matter
<ul style="list-style-type: none"> • They can communicate via any of these formats
<ul style="list-style-type: none"> • Will meet this requirement
<ul style="list-style-type: none"> • Will present all external communications to the Department or others for review before anything is released
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Approach has 3 phases – Discovery, Design and Deliver. • Will create 2 groups – a Governance Steering Committee and an Advisory Board.
<ul style="list-style-type: none"> • Will work closely with the State to create survey sampling frame • Will provide to State for prior approval
<ul style="list-style-type: none"> • Explained how survey methodology works • Did not really answer the question
<ul style="list-style-type: none"> • Will use Qualtrics
<ul style="list-style-type: none"> • Said yes but didn't elaborate as to how they would make this happen
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Will work on data sharing agreements prior to data collection
<ul style="list-style-type: none"> • Stated they will work with Department to determine what level and type of reporting is required • Did not specify any dates
<ul style="list-style-type: none"> • They stated they would create powerpoints • Will run prep sessions with selected staff
E. Representative Group
<ul style="list-style-type: none"> • Will work with Department to identify stake holders
<ul style="list-style-type: none"> • Will work with the Department to set up meetings and communication within the group.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/25/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none">• Will work with the Department to recruit?
<ul style="list-style-type: none">• Said they would add this groups highlights into larger report for Department• Will work with representative group
F. Reports
<ul style="list-style-type: none">• Included a report schedule and diagram• Recommend weekly reports not quarterly
2. Staffing
<ul style="list-style-type: none">• Provided attachment 7
<ul style="list-style-type: none">• None used
<ul style="list-style-type: none">• Provided Attachment 8
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided attachment 9• Does not list who will be doing what

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Started in 2008 as KSM Consulting. In 2021 arrived at new name and entity headquartered in Indianapolis IN • Expertise in data analysis, collection survey development and modeling. • Employs a team of data scientists with advance analytics with AI and Machine learning techniques. • 3 Prior projects provided.
2. Subcontractors	<ul style="list-style-type: none"> • None
3. Organizational Chart	<ul style="list-style-type: none"> • Detailed org. chart provided with positions and named resources.
4. Litigation	<ul style="list-style-type: none"> • None
5. Financial Viability	<ul style="list-style-type: none"> • Brief statement of viability. No statements, ledgers or returns provided. No independent auditor statement. 3 paragraphs of what was not applicable to their financial reporting requirement requested to include in the proposal.
6. Certificate of Insurance	<ul style="list-style-type: none"> • Multiple Certificates attached. Insurers listed detail types, limits and effective dates including Tech cyber and Crime.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 1/26/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor confirms and will comply with this requirement.
<ul style="list-style-type: none"> • Vendor provided very detailed responses and comments indicating understanding and compliance of policies as a result of a thorough review. • Vendor provided some suggestions in the response that Maine webmaster participation may be needed or requested.
<ul style="list-style-type: none"> • Qualtrics will be used. • Vendor will develop all materials and websites and will transfer to the Dept. at any time. • Vendor described the technology in depths and security compliance ratings of the product.
<ul style="list-style-type: none"> • Vendor restated compliance with this requirement.
B. Communication
<ul style="list-style-type: none"> • Meeting at request and as agreed upon by both parties.
<ul style="list-style-type: none"> • Vendor provided a table that referenced the type and frequency noting additional meetings will be added as needed.
<ul style="list-style-type: none"> • Vendor will meet and communicate in a variety of phone and collaborative electronic tools along with in person meetings.
<ul style="list-style-type: none"> • Vendor confirms and will comply with this requirement.
<ul style="list-style-type: none"> • No external communication will be completed without prior dept. approval.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Vendor provided a lengthy and detailed response deriving how to deliver and create surveys to demonstrate equity.
<ul style="list-style-type: none"> • Colorful chart detailing survey development steps to design/develop surveys.
<ul style="list-style-type: none"> • Vendor described in depth random sampling, validation and error identification while protecting data.
<ul style="list-style-type: none"> • Quality control processes to support reliable and valid results.
<ul style="list-style-type: none"> • Vendor repeated many steps previously noted
<ul style="list-style-type: none"> • Reasonable accommodations will be offered to respondents
<ul style="list-style-type: none"> • Qualtrics will be the survey mechanism.
<ul style="list-style-type: none"> • Vendor confirmed responses will remain confidential.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Data collection methods will be agreed upon at project launch
<ul style="list-style-type: none"> • Vendor will submit draft reports for review.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Resultant LLC

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EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • Vendor will create presentation materials
E. Representative Group
<ul style="list-style-type: none"> • Vendor will work with the dept. to identify key stakeholders to assist with recruitment.
<ul style="list-style-type: none"> • Vendor will work with the department to create meeting and communication standards to manage the group.
<ul style="list-style-type: none"> • Vendor will craft talking points, presentation and all material needed to present to the committee.
F. Reports
<ul style="list-style-type: none"> • Lengthy narrative of compliance with sample progress report provided.
<ul style="list-style-type: none"> • Vendor agrees to comply and also suggested weekly reported or other methods the dept. would request.
2. Staffing
<ul style="list-style-type: none"> • Attachment 7 included.
<ul style="list-style-type: none"> • No subcontractors on the engagement.
<ul style="list-style-type: none"> • Included in section 8 Descriptions and plans appear complete and detailed.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Included in attachment 9. Plan was detailed with timeline, tasks and resources as requested.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 2/22/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Out of State of Maine • For-profit
2. Subcontractors	<ul style="list-style-type: none"> • Experience with state programs • No survey experience • Technology focused
3. Organizational Chart	<ul style="list-style-type: none"> • Provided
4. Litigation	<ul style="list-style-type: none"> • None listed
5. Financial Viability	<ul style="list-style-type: none"> • Unclear if this is enough documentation
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 2/22/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Detailed response • Will use feature of MS Word to evaluate for reading level
<ul style="list-style-type: none"> • Will use Qualtrics
<ul style="list-style-type: none"> • Meets requirement
B. Communication
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Suggested meeting cadence based on above topics
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Involving reps from Maine TANF, ASPIRE, DOL, and DAFS on Governance Steering Committee • Two-tiered governance structure involving multiple state employees seems beyond the scope of contract • Advisory Board (Tier 2 of governance structure) is combination of state employees and the Representative Group of TANF recipients
<ul style="list-style-type: none"> • Paragraph 4 in response seems to be copy-pasted from some other bid for teaching evaluation • Seems like primarily via email • Heavy jargon, no substance about proposed process for current services in Maine
<ul style="list-style-type: none"> • Very general information, no clear details to approach or methodology in Maine's TANF population
<ul style="list-style-type: none"> • No information
<ul style="list-style-type: none"> • No information
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Acknowledged requirement
<ul style="list-style-type: none"> • Did not address process of analysis, drafting, or scope of legislative report
<ul style="list-style-type: none"> • Minimally responsive • Will provide PowerPoints
E. Representative Group

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: Resultant LLC

DATE: 2/22/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none">• Acknowledged
<ul style="list-style-type: none">• Did not address recruitment and convening strategy
<ul style="list-style-type: none">• Minimally acknowledged requirement with no details
F. Reports
<ul style="list-style-type: none">• Meets requirement
<ul style="list-style-type: none">• Proposed weekly
2. Staffing
<ul style="list-style-type: none">• Provided
<ul style="list-style-type: none">• None listed
<ul style="list-style-type: none">• 1,142 hours proposed, 0.55FTE (seems low)
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Excellent polling credentials • MCB project – good example • All projects, really good examples
2. Subcontractors	<ul style="list-style-type: none"> • Louisiana? • P-printed
3. Organizational Chart	<ul style="list-style-type: none"> • Met Requirements
4. Litigation	<ul style="list-style-type: none"> • Non disclosed
5. Financial Viability	<ul style="list-style-type: none"> • Met Requirements
6. Certificate of Insurance	<ul style="list-style-type: none"> • Met Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Appreciated the response to this section
Part II
A. General Requirements
• Met Requirements
• Met Requirements
• Met Requirements
• Met Requirements
B. Communication
• Met Requirements
• Met Requirements
• Met Requirements
• Met Requirements
• Met Requirements
C. TANF and ASPIRE-TANF Participant Survey
• Straightforward response, slightly underwhelming in lack of detail
• Met Requirements
• God Response, margin of error and confidence level
• Appreciate the multiple modes
• Matter of fact
• Thoughtful response, not just yes, we will keep it confidential
D. Data Collection, Analysis, and Reporting
• Typo
• Met Requirements
• Met Requirements
• Met Requirements
E. Representative Group
• Met Requirements
• Simple, straightforward
• Appreciate bidders view of their role supporting the group
F. Reports
• Met Requirements
• Met Requirements
2. Staffing
• Met Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: February 26, 2024

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• Met Requirements
<ul style="list-style-type: none">• Met Requirements, liked bios• Dem polling firm
3. Implementation - Work Plan
<ul style="list-style-type: none">• Liked the detailed table

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 02/25/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • I - Established in Boston in 2010 • I – Specializes in polling & focus groups on complex public policy • I – Provided 3 relevant projects
2. Subcontractors	<ul style="list-style-type: none"> • I – Metropolitan Research Services – survey fielding & recruiting partner • I – Recycled Paper Printing – printing partner
3. Organizational Chart	<ul style="list-style-type: none"> • I – Provided, unclear if entire organization is project team.
4. Litigation	<ul style="list-style-type: none"> • I – None
5. Financial Viability	<ul style="list-style-type: none"> • I – Subsidiary of The Massachusetts Institute for a New Commonwealth, Inc d/b/a MassInc. • I – Financials (990 Tax return for 2020 and 2021 and audited statements provided for 2022 • I – Can provide MPG specific financials if needed. Reviewed but not audited.
6. Certificate of Insurance	<ul style="list-style-type: none"> • I – Provided, Expires 1/1/25, Umbrella Liability of \$1m

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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DATE: 02/25/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
B. Communication
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Will review previous surveys to identify questions that should be repeated or modified.
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • N – Response does not address diversity of experiences
<ul style="list-style-type: none"> • N – Does not address CY24 and biannually thereafter.
<ul style="list-style-type: none"> • I – Phone number included in online survey for respondents who require interpretation or other accommodations
<ul style="list-style-type: none"> • I – Recommend \$10 incentive for households who complete survey
<ul style="list-style-type: none"> • I – Will anonymize all responses
<ul style="list-style-type: none"> • I – Emails will be collected to distribute incentives but will be removed prior to dissemination.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Will scrub data of any PII.
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • N – Does not address CY2024 or biannually thereafter.
<ul style="list-style-type: none"> • I – Department will be responsible for publishing and disseminating the report.
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
E. Representative Group
<ul style="list-style-type: none"> • I – Will use the survey to identify participants for the Representative Group

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: The MassINC Polling Group, Inc.

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EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement • I – will create schedule of meetings and agendas. • I – Recommend \$100 incentive for those who participate.
<ul style="list-style-type: none"> • N – Does not providing support to group if they elect to present report to the Joint Standing Committee.
F. Reports
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
<ul style="list-style-type: none"> • I – Acknowledge adherence to this requirement
2. Staffing
<ul style="list-style-type: none"> • I – Attachment 7 provided • N – Does not include minimum qualifications
<ul style="list-style-type: none"> • N – Do not address oversight and management of subcontractors
<ul style="list-style-type: none"> • I – Attachment 8 provided • N – Did not include time allocation. Stated it's included as Appendix G (Budget Form).
3. Implementation - Work Plan
<ul style="list-style-type: none"> • I – Attachment 9 provided

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> • I – Provided • I – Staffing is \$94,300 for .27 FTE • I – Includes \$10.7k and \$4.5k for Metropolitan and RPP subcontractors, respectively. • I - Used state rate of \$.655/mile. Should be .50/mile. • I – Includes \$7k for incentives, plus \$1,534 for processing fees.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: February 23, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Located out of Boston, MA • Specialized in survey administration and working with focus groups • Has worked with SNAP populations but no mention of TANF
2. Subcontractors	<ul style="list-style-type: none"> • Field services will be provided through Metropolitan Research Services (Metropolitan) • Postcards and other paper products will be provided through Recycled Paper Printing (RPP)
3. Organizational Chart	<ul style="list-style-type: none"> • Not sure if what is provided is just at a very high level or if it is specifically the project team
4. Litigation	<ul style="list-style-type: none"> • None Provided
5. Financial Viability	<ul style="list-style-type: none"> • We asked for financial statement specifically for MPG but they instead provided statements from their parent company which made the task more difficult than needed. MPG stated that they will provide statements specific to MPG if requested. • Otherwise defer to Financial Expert on review team
6. Certificate of Insurance	<ul style="list-style-type: none"> • Set to expire in April • Umbrella policy • Defer to financial expert

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: The MassINC Polling Group, Inc.

DATE: February 23, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Requirement met NOTE: Writeup included before this item was excellent but out of place. I'm concerned that proper credit may not be available as this part is scored separate from the below
<ul style="list-style-type: none"> Only mentioned meeting the reading level requirement – nothing on items A-D
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met
B. Communication
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Mentioned preference of regular check-in meetings
<ul style="list-style-type: none"> All regular communication methods recognized and agreed to.
<ul style="list-style-type: none"> Mentioned that team is readily available for in-person meetings as well
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> Mentions assumption that a prior survey exists – it does not. Vendor is expected to create one specifically for this purpose.
<ul style="list-style-type: none"> It appears that vendor would be open to create one though by offering the 'opportunity for multiple rounds of feedback and revisions'
<ul style="list-style-type: none"> Said they would upon award of the contract
<ul style="list-style-type: none"> Offers live interviews following waves of mail and email efforts. Aims for a sample size of 500 which they claim would provide a margin of error of +- 5%
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Respondents will be assigned unique ID codes to obfuscate the responses.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Specific mention that they will not be responsible for publishing or disseminating report based on the Data
<ul style="list-style-type: none"> Mentioned availability to present if needed/requested
E. Representative Group
<ul style="list-style-type: none"> Will utilize survey as a way to develop/build focus group
<ul style="list-style-type: none"> Plan on primarily using zoom to convene group.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: The MassINC Polling Group, Inc.

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EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

<ul style="list-style-type: none"> • Doesn't appear to understand TANF population and/or the geographic diversity of the population
<ul style="list-style-type: none"> • Requirement met
F. Reports
<ul style="list-style-type: none"> • Requirement met – little detail provided
<ul style="list-style-type: none"> • Requirement met
2. Staffing
<ul style="list-style-type: none"> • Team of 6 provided – adequate?
<ul style="list-style-type: none"> • Metropolitan will provide the survey field services • RPP will provide printing services
<ul style="list-style-type: none"> • Requirement met.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Some information for the LIFT report will not be available until later in the year. Current plan to knock it out early in the process but this may not be possible. • Mention made that the workplan is adaptable • Work Plan Follow-up is very detailed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 2/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Established in 2010 • HQ in Mass • Specialize in surveys and focus groups for hard to reach populations • Public service/government experience but no TANF specifically • Provided 3 projects, all related to the RFP requirements
2. Subcontractors	<ul style="list-style-type: none"> • Metropolitan Research Services • Recycled Paper Printing
3. Organizational Chart	<ul style="list-style-type: none"> • Showed upper mgmt, nothing else
4. Litigation	<ul style="list-style-type: none"> • None
5. Financial Viability	<ul style="list-style-type: none"> • Provided tax statements, appear viable • Provided 3 years of financial information
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 2/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Kind of said they would be available for meetings
<ul style="list-style-type: none"> • Will comply with policies
<ul style="list-style-type: none"> • Will ensure materials are at 6th grade level, no info on how
<ul style="list-style-type: none"> • Will provide all materials to the Department
<ul style="list-style-type: none"> • Will provide all materials to the Department
B. Communication
<ul style="list-style-type: none"> • Will meet with the Department when requested
<ul style="list-style-type: none"> • Will create a meeting schedule for these items
<ul style="list-style-type: none"> • Will meet with any form of communication and can meet in person
<ul style="list-style-type: none"> • Will meet this requirement
<ul style="list-style-type: none"> • Will gain prior approval from the Department
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Will work with the department to develop the questionnaire
<ul style="list-style-type: none"> • Multiple rounds of feedback
<ul style="list-style-type: none"> • Did not address any of the listed items
<ul style="list-style-type: none"> • Will get Department approval before releasing any communications.
<ul style="list-style-type: none"> • Will review current and past recipients.
<ul style="list-style-type: none"> • Sample size of 500
<ul style="list-style-type: none"> • Will provide a phone number
<ul style="list-style-type: none"> • Will make survey anonymous
<ul style="list-style-type: none"> • Will scrub data for PII
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Will work with the Department to develop protocols
<ul style="list-style-type: none"> • Will work with Department to determine best ways to analyze data
<ul style="list-style-type: none"> • Department is responsible for the final report – to publish it, etc
<ul style="list-style-type: none"> • Will be available to assist
E. Representative Group
<ul style="list-style-type: none"> • Want to use survey to recruit the representative group
<ul style="list-style-type: none"> • Will create a schedule of meetings
<ul style="list-style-type: none"> • Will let group draw their own conclusions
<ul style="list-style-type: none"> • Will assist as necessary
F. Reports
<ul style="list-style-type: none"> • Will meet requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS – ALM Team

<ul style="list-style-type: none">• Will meet requirements
2. Staffing
<ul style="list-style-type: none">• Provided attachment 7
<ul style="list-style-type: none">• Listed the two subcontractors.• Did not list anything for management of the subcontractors.
<ul style="list-style-type: none">• Provided attachment 8• Provided names and brief background
3. Implementation - Work Plan
<ul style="list-style-type: none">• Provided attachment 9• Did not provide hours

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • 538 data provider + variety of topics including policy, clean energy, elections, health, education and many others. • This section 191 pages. Vendor may have put detail here that needs to be in the actual response. • MA commission for the blind with multi-modal surveys • VT Public Services • Shah Family Foundation – Food insecurity
2. Subcontractors	<ul style="list-style-type: none"> • Metropolitan Research Svc. Survey fielding and recruiting partner. They provide telephone and online sample, translation, data processing and data collection. Latino owned certified small business. • Recycle Paper Printing. Postcard printing and physical mailing services.
3. Organizational Chart	<ul style="list-style-type: none"> • Provided. Small team. • Org. chart displays positions and each position has a named resource. Two tiers. President and managers. Implies subcontractors will complete assigned work/tasks with oversight.
4. Litigation	<ul style="list-style-type: none"> • None.
5. Financial Viability	<ul style="list-style-type: none"> • 3 years of annual audited financial statements/returns provided.
6. Certificate of Insurance	<ul style="list-style-type: none"> • Included. • Provides types, holder and limits for each except for auto.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor provided a lot of content prior to acknowledging hours of operation. • Vendor perceives 3 main parts: Analyzing existing data, designing the survey and reporting out. • Analysis phase: review what currently exists. Look for trends. Experience using a lot of data that can be reported out in standard tools for the dept. to review as needed. • Participant Survey – Collaboratively work with the dept. to create the survey. Postcards with a QR code invitation for online survey. Email and texts will also be used. • Random sample population will be created. • Compensation recommended to encourage responses. • Report will be comreated and presentations developed for standing committee presentation. • Restated use of named subcontractors. • Vendor confirms working hours cited.
<ul style="list-style-type: none"> • Vendor confirms reading the requirements and will comply with policies and reading level requirements.
<ul style="list-style-type: none"> • All materials are the property of the client and are available to review during the engagement.
<ul style="list-style-type: none"> • Vendor reiterated materials produced are the property of the Dept.
B. Communication
<ul style="list-style-type: none"> • Vendor will be available as requested throughout the project.
<ul style="list-style-type: none"> • Vendor will take lead on organizing and preparing agendas for each meeting.
<ul style="list-style-type: none"> • Vendor is amenable to any of the above forms of communication.
<ul style="list-style-type: none"> • Vendor confirms it will respond within 3 business days.
<ul style="list-style-type: none"> • Vendor commits to obtaining prior approval before any external communication.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Vendor will obtain prior approval before any external communications • Dept will have multiple feedback rounds.
<ul style="list-style-type: none"> • Vendor will work with the Dept. to draft the survey and make sure all data requested.
<ul style="list-style-type: none"> • Dept will review, revise and provide feedback as needed.

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DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

<ul style="list-style-type: none"> • Vendor will provide detailed sampling plan
<ul style="list-style-type: none"> • Vendor restated requirement for the population and duties. • Vendor stated they would consult census data • Minimums sample of 500 to support 95% confidence factor
<ul style="list-style-type: none"> • Phone number will be published in online survey for translation requests or alternative method to respond (in English?) • Dept will provide vendor list of languages needed.
<ul style="list-style-type: none"> • Responses will be anonymized • Incentives will require some contact inform • All responses will be scrubbed and there will not be any PII
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Vendor will work with the Dept to establish data review/delivery protocols.
<ul style="list-style-type: none"> • Vendor restated requirements.
<ul style="list-style-type: none"> • Vendor will be available to assist as much or as little as the dept. would like.
E. Representative Group
<ul style="list-style-type: none"> • Vendor will coordinate with the dept.
<ul style="list-style-type: none"> • Vendor will lead recruitment. • Vendor will schedule meetings and handle outreach and comms. • Confirms requirement.
<ul style="list-style-type: none"> • Vendor will present finding • Vendor will support interpretation and fact checking
F. Reports
<ul style="list-style-type: none"> • Vendor briefly affirmed.
<ul style="list-style-type: none"> • Vendor briefly affirmed schedule.
2. Staffing
<ul style="list-style-type: none"> • Included in attachment 7.
<ul style="list-style-type: none"> • Detailed in subcontractor section and briefly restated here. No new information.
<ul style="list-style-type: none"> • Included in Attachment 8
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Included in attachment 9. • Timeline provided w/ summary level detail. • Plan formatted as a Word document with tasks, resources assigned with rough estimates of timeframes "Late October to Mid November" • More of a narrative with an estimate.

**STATE OF MAINE
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RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 2/21/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • From Mass • For-profit subsidiary to non-profit • Conducted survey to evaluate accessibility for blind respondents • Extensive survey experience • SNAP survey
2. Subcontractors	<ul style="list-style-type: none"> • Metropolitan Research Services – survey fielding • Recycled Paper Printing – printing material for survey distribution
3. Organizational Chart	<ul style="list-style-type: none"> • Provided only for leadership
4. Litigation	<ul style="list-style-type: none"> • None listed
5. Financial Viability	<ul style="list-style-type: none"> • Provided
6. Certificate of Insurance	<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
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RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 2/21/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Acknowledged • Unclear how reading level will be evaluated
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
B. Communication
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement • Staff in Boston
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Multiple rounds of feedback by Department • Will review previous TANF surveys
<ul style="list-style-type: none"> • Minimally responsive but acknowledged requirement
<ul style="list-style-type: none"> • Proposes using Census data to fill gaps in demographic data • Will weight data • Postcards, email, text, phone with unique ID codes • Phone interviews after mail and email to check for self-selection bias • Q – Are they proposing to phone interview every participant who completes a survey? • Sample size of 500
<ul style="list-style-type: none"> • Minimally responsive • Unclear how existence of the survey will be communicated to non-English speakers
<ul style="list-style-type: none"> • Meets requirement
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Minimally acknowledged
<ul style="list-style-type: none"> • Minimally acknowledged
<ul style="list-style-type: none"> • Minimally acknowledged
E. Representative Group
<ul style="list-style-type: none"> • Acknowledged

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: The MassINC Polling Group, Inc.

DATE: 2/21/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none"> • Will use survey to recruit, open to other recruiting options • Didn't elaborate on recruitment strategies
<ul style="list-style-type: none"> • Lack of details, acknowledged requirement • Most meetings will use Zoom, option for some in-person
<ul style="list-style-type: none"> • Editor and fact-checker of rep group report • Minimally responsive
F. Reports
<ul style="list-style-type: none"> • Acknowledged
<ul style="list-style-type: none"> • Acknowledged
2. Staffing
<ul style="list-style-type: none"> • Provided
<ul style="list-style-type: none"> • Metropolitan Research Services will provide survey services • Sub for printing
<ul style="list-style-type: none"> • Time allocations in budget plan, couldn't review
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: February 26, 2023

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • This is not a public health project • Do not need someone to lead the Rep group, and it’s not an advisory group • e-TTA is cool, but nothing like what we are doing • SNAP ED a little closer to it • Maine CDC project – once again, this is not a public health project
2. Subcontractors	<ul style="list-style-type: none"> • Met Requirements
3. Organizational Chart	<ul style="list-style-type: none"> • Met Requirements, did we need the whole university
4. Litigation	<ul style="list-style-type: none"> • Disclosed
5. Financial Viability	<ul style="list-style-type: none"> • Met Requirements
6. Certificate of Insurance	<ul style="list-style-type: none"> • Met Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: February 26, 2023

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
• Met Requirements
• Met Requirements
• Met Requirements
• Met Requirements
B. Communication
• Met Requirements
• Met Requirements
• Met Requirements
• Met Requirements
• Met Requirements
C. TANF and ASPIRE-TANF Participant Survey
• Good survey knowledge
• Met Requirements
• Realistic assumptions on response rates
• Appreciate the paper surveys
• Met Requirements, thoughtful response
D. Data Collection, Analysis, and Reporting
• Met Requirements
• Thorough and thoughtful response
• Very thorough and thoughtful response, liked the committee prep
E. Representative Group
• Good strategy
• Light on recruitment, focus on getting the group to comment on meetings
• Seems to be focused on having the group report on the data, not their experiences and how that relates to the data
F. Reports
• Met Requirements
• Met Requirements
2. Staffing
• Met Requirements
• How is less than 1.5 FTE going to do this?
• Met Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: February 26, 2023

EVALUATOR NAME: Julian Baer

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• Met Requirements• Do Not care about public health qualifications
3. Implementation - Work Plan
<ul style="list-style-type: none">• Met Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: 02/25/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
	<ul style="list-style-type: none"> • I – UNE Center for Excellence in Public Health (CEPH) • I – Decades of experience conducting research involving data collection and analysis. • I - Institutional Review Board to oversee research involving human subjects • I_ HIPPPAA and ADA 508 compliant REDCap (Research Electronic Data Capture) • I – Provided 3 relevant projects, 1 current provider of the Department, “has worked with SNAP-Ed partners to determine the survey and other collection tools.”
2. Subcontractors	
	<ul style="list-style-type: none"> • I – House of Languages – on-site and remote interpreting and document translation
3. Organizational Chart	
	<ul style="list-style-type: none"> • I – Provided
4. Litigation	
	<ul style="list-style-type: none"> • I – Provided
5. Financial Viability	
	<ul style="list-style-type: none"> • I – Provided, appears to be financially viable
6. Certificate of Insurance	
	<ul style="list-style-type: none"> • I – Provided, expires 10/1/24, No professional or Umbrella Liability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: 02/25/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement • I – Local Maine based team
<ul style="list-style-type: none"> • I – Acknowledges adherence to this requirement • I – Use Flesch-Kincaid Reading Level assessment tool.
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement • I - Acknowledges adherence to this requirement
B. Communication
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement • I - Acknowledges adherence to this requirement • I – Every member has own zoom account, allowing up to 100 participants • I - Acknowledges adherence to this requirement • I - Acknowledges adherence to this requirement • I - Acknowledges adherence to this requirement • I – Department will be provided communications for approval and editing prior to being sent.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement • I – Will use REDCap web-based data collection software license • I – Accepted by most institutional review boards (IRBs) as a secure way to collect and store data from persons. • I – branching logic to make experience as positive and efficient as possible, skipping questions they indicate do not apply • I – Survey will not exceed 20 minutes • I – Survey will be tested with a small group prior to launch • I - Acknowledges adherence to this requirement • I - Acknowledges adherence to this requirement • I – REDCap surveys can be administered as Web-based, phone-based questionnaire, or printed • I – Project team will work with participants to address technology, literacy, or language needs. • P – Surveys will be sent in alternative language or formats if DHHS records include information about literacy barriers. • I – PII will not be collected

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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DATE: 02/25/24

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none"> • I – Incentive distribution information for survey completion incentive of \$10 gift cards (with exclusion of tobacco and alcohol) will be separate from the survey.
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement • I – visualization approaches to tell the story of Maine’s program data
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement • I – Debriefing and identification to inform the next round of data collection, analysis, and legislative reporting and presentations.
E. Representative Group
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement • I – Will select a random sample to ensure perception of unbiased recruitment.
<ul style="list-style-type: none"> • I – Will provide participants a chance to weigh in on schedule and meeting format, virtual, in-person, or hybrid.
<ul style="list-style-type: none"> • I – Sr Research Coordinator and Research Assistant available to Group by request for technical assistance to review the data to generate findings and report. • I – Mini-sessions provided on what to expect if presenting to legislature; space layout, roles, process and procedures. Practice presentations. • I – Provide translation through House of Languages • I – Provide a Project Assistant for administrative support
F. Reports
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement
<ul style="list-style-type: none"> • I - Acknowledges adherence to this requirement
2. Staffing
<ul style="list-style-type: none"> • I – Attachment 7 provided
<ul style="list-style-type: none"> • I – Provided
<ul style="list-style-type: none"> • I – Attachment 8 provided
3. Implementation - Work Plan
<ul style="list-style-type: none"> • I – Attachment 9 provided

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> • I – Provided • I – Includes \$8775 for Sub – House of Languages • I – Includes \$1150 for travel to DHHS @ 46 cents/mile • I – Includes \$4250 for incentives • I – Includes \$4200 for printing/mailing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: University of New England

DATE: 02/25/24

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EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

- | |
|--|
| <ul style="list-style-type: none">• I – Includes \$111k for indirect costs @ federally approved rate |
|--|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: Feb 23, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Maine based• No specific TANF experience noted
2. Subcontractors
<ul style="list-style-type: none">• House of Languages – Provide on-site and remote interpretation services
3. Organizational Chart
<ul style="list-style-type: none">• Project team consists of 4 members. Larger chart also provided
4. Litigation
<ul style="list-style-type: none">• Few items provided – No concern
5. Financial Viability
<ul style="list-style-type: none">• Defer to financial expert on team
6. Certificate of Insurance
<ul style="list-style-type: none">• Requirement met – defer to financial expert for analysis

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

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BIDDER NAME: University of New England

DATE: Feb 23, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Requirement exceeded Emails and phone numbers for each team member will also be provided
<ul style="list-style-type: none"> All points were discussed Requirement met Flesch-Kincaid Reading level assessment will be utilized
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met
B. Communication
<ul style="list-style-type: none"> No concerns
<ul style="list-style-type: none"> Will utilize zoom a primary means of communication
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement met
<ul style="list-style-type: none"> Requirement exceeded. Will request written approval prior to any external sharing
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> REDCap data collection software will be utilized REDCap is both HIPAA and ADA compliant Survey will be designed to take less than 20 mins to complete Will aim for a 6th grade reading level that will not exceed an 8th grade House of Languages will provide translation services
<ul style="list-style-type: none"> Requirement exceeded. Well planned and thought out.
<ul style="list-style-type: none"> For conversation: https://www.surveymonkey.com/mp/margin-of-error-calculator/ Approach will use current and former participant information from OFI to identify the correct target population
<ul style="list-style-type: none"> Administered via REDCap that is web-based, via telephone, or paper copy that is manually entered. Specific supported languages not provided
<ul style="list-style-type: none"> Survey administrators must complete the CITI online training module on Human Subjects' Protection within the past 48 months Data will be de-identified but method wasn't provided Recommends a \$10 incentive gift card (not applicable in this section)
D. Data Collection, Analysis, and Reporting

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: Feb 23, 2024

EVALUATOR NAME: Rainald Gervais

EVALUATOR DEPARTMENT: Data Team – Business Technology - OFI

<ul style="list-style-type: none"> • Will work with the department to gather information from past years and current
<ul style="list-style-type: none"> • Unsure if they understand the LIFT report but they show initiative.
<ul style="list-style-type: none"> • Will prepare key talking points and provide canned responses • Will provide slides or other visual depictions of key aspects of the reports' • Will provide practice/work sessions prior to formal presentation
E. Representative Group
<ul style="list-style-type: none"> • Requirement met
<ul style="list-style-type: none"> • Unsure if current plan will reach the TANF pop segment that does not have computers
<ul style="list-style-type: none"> • House of languages will provide translation services
F. Reports
<ul style="list-style-type: none"> • Exceeds expectations
<ul style="list-style-type: none"> • Met requirement
2. Staffing
<ul style="list-style-type: none"> • Provided. Unsure if team will be adequate as provided – too small?
<ul style="list-style-type: none"> • House of Languages will serve as consultant and will provide UNE with translation and interpreter services • Grant Fiscal Manager will work with staff to ensure that procurement and payment policies/procedures are followed • No specific language list provided – unsure how many languages are supported
<ul style="list-style-type: none"> • Met requirement
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Workplan accounts for Focus Group, Survey and LIFT report items

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: 2/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS- ALM Team

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Located in Maine • Center for Excellence in Public Health – decades of experience • Listed 4 staff members for entire project? • HIPPA, REDCap compliant • Contract with State terminated early?
2. Subcontractors
<ul style="list-style-type: none"> • House of Languages – for interpreting and document translation
3. Organizational Chart
<ul style="list-style-type: none"> • Included project team (4 people) and included full organizational org charts
4. Litigation
<ul style="list-style-type: none"> • Listed 5
5. Financial Viability
<ul style="list-style-type: none"> • Provided and look financially viable
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, current

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: 2/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS- ALM Team

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Will meet this requirement
<ul style="list-style-type: none"> • Will follow IT Policies • Will ensure 6th grade level documents
<ul style="list-style-type: none"> • UNE agrees to provide Department with a master copy of materials
<ul style="list-style-type: none"> • Will meet this requirement
B. Communication
<ul style="list-style-type: none"> • Will meet as requested
<ul style="list-style-type: none"> • Will meet at mutually agreed upon for a-h • Will set clear agendas for meetings and have the experience for project momentum
<ul style="list-style-type: none"> • Can communicate in any of these forms
<ul style="list-style-type: none"> • Will respond within 3 days or provide an alternate contact if someone is out
<ul style="list-style-type: none"> • Will provide a copy of external communications for prior approval • Will require written approval
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Will use REDCap web based data collection to create an anonymous survey • Survey will cover the topics listed and align with TANF • 20 min survey • Survey will be tested with small group of TANF participants
<ul style="list-style-type: none"> • Project work timeline listed for Attachment 9 • Will have 10 days to review and questions
<ul style="list-style-type: none"> • Sample will be current and previous year participants • Sample size of 248 of current and 93 for previous • They only expect a 7% response rate?
<ul style="list-style-type: none"> • Will administer web based survey by computer or smart phone • Phone based questionnaire • Paper survey available • Will send out post card with QR Code
<ul style="list-style-type: none"> • Will seek ethical review of survey and data collection efforts • Will provide survey incentives
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Will work with Department to ensure coordination with the child and family data • Will focus on the currently collected data with federal data

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: University of New England

DATE: 2/26/2024

EVALUATOR NAME: Melanie L Messina

EVALUATOR DEPARTMENT: DHHS – DAFS- ALM Team

<ul style="list-style-type: none"> • Will meet the requirements of the survey and draft reports • All rights will belong with the Department
<ul style="list-style-type: none"> • Will coordinate and assist the department and the presentation • Key talking points, slides, practice presenting, and follow up
E. Representative Group
<ul style="list-style-type: none"> • Will work with the Department to identify participants • Will create an oversampling and backup invitees
<ul style="list-style-type: none"> • Will recruit and determine how the group would like to meet including in person • Web based questionnaire will provide group to help decide format, scheduling and guidelines.
<ul style="list-style-type: none"> • Will provide group with the survey data and provide templates and tools • Will assist in the review of the data and help prepare their presentation • Will provide the group with a project assistant
F. Reports
<ul style="list-style-type: none"> • Said that they are very skilled but did not address the actual reports • Agrees to submit all reports required per the timelines requested
2. Staffing
<ul style="list-style-type: none"> • Provided attachment 7 • House of Languages
<ul style="list-style-type: none"> • Provided attachment 8 • Provided very high hours • One person is TBD
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided Attachment 9 • No time or anything listed for the Departments participation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	<ul style="list-style-type: none"> • Terminated incumbent. • Center for Excellence in Public Health • Multi-faceted expertise and experience • HIPAA compliant • Journal contributor • ADA accessibility with REDCAP tool • Vendor provided staffing details, name and brief bio. • Provided project details: Community living, SNAP-ed recent work and MeCDC
2. Subcontractors	<ul style="list-style-type: none"> • House of Languages – interpretation and translation services for 70+ languages spoken in Maine. • Member of American Translators Association
3. Organizational Chart	<ul style="list-style-type: none"> • 4 members in the management team. • Positions have names and FTE percentages. • Additional organization chart with all staff positions available. There is one vacancy noted. • Org. chart for UNE Management and Academic Affairs and other specialized services/colleges under the University umbrella also provided.
4. Litigation	<ul style="list-style-type: none"> • Pending litigation – Student title IX complaint • Settled student litigation re: discrimination. • Settled student litigation re: client abuse by a UNE student. • Resolution of employment claim • Resolution of employment discrimination

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

5. Financial Viability
<ul style="list-style-type: none">• Financial states provided for 2023 and 2022, 2022 and 2021 by Berry Dunn
6. Certificate of Insurance
<ul style="list-style-type: none">• Certificate included.• Provides amounts, types and limits. No umbrella.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: University of New England

DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Vendor confirms hours. • Vendor will provide email and phone numbers for each team member +Directors for contact as needed.
<ul style="list-style-type: none"> • Committed to policy compliance. • Team commits to accessibility ADA Section 508, WCAG and plain language requirements. • All materials will be assessed using Flesch-Kincaid reading level assessment tool.
<ul style="list-style-type: none"> • Vendor agrees to this requirement. • IT employees will assist as needed
<ul style="list-style-type: none"> • Vendor acknowledges requirement. • All materials will be shared with the Dept.
B. Communication
<ul style="list-style-type: none"> • Vendor confirms requirement. • Part of a dynamic center of excellence
<ul style="list-style-type: none"> • Vendor proposed mutually scheduled meetings. • Collaboration • Use of University Zoom account to host meetings on a flexible schedule
<ul style="list-style-type: none"> • Vendor confirms ability to us multiple modes to communicate with the dept.
<ul style="list-style-type: none"> • Vendor confirms requirement and verifies back up resources are assigned should primary contacts be OOO for time sensitive needs.
<ul style="list-style-type: none"> • Vendor agrees to this requirement. • Drafts with a request to edit will be provide before any external communication is made.
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • Vendor will use existing REDCAP data collection software license to create anonymous survey. • Tool is HIPAA and ADA 508 compliant. • Vendor restated requirements in this question.
<ul style="list-style-type: none"> • Vendor referenced project work timeline in attachment 9 to describe phases of work and methodology for development, aggregation and transmission. • Timeline reflects 10day built in review period for the dept for feedback.
<ul style="list-style-type: none"> • Vendor described sampling targe that included groups noted above.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: University of New England

DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

- Web based surveys completed by phone or computer.
- Oral responses by phone and paper
- Recruitment will be in multiple leagues

- Vendor will seek ethical review and determination by vendor's institutional review board to meet core confidentiality component of an IRB review.
- Names and other PII will not be part of collection processes/elements.
- Vendor suggested compensation. Ability to deliver compensation need some contact data will be needed for a short term.

D. Data Collection, Analysis, and Reporting

- Vendor confirmed the requirement.
- Data collection and sharing will aim to support the depts. Future program priorities.

- Vendor confirms requirements and delivery needs.
- Vendor described detailed tasks needed to achieve.
- All data will be provided to/shared with the dept.

- Vendor confirms this requirement and submission schedule.
- Preparation, practice sessions and follow up presentations and learnings included.

E. Representative Group

- Vendor will work with the dept and comply with this requirement.
- Random and oversampling methodologies will be employed.

- Vendor will comply as mutually agreed with the dept. to recruit participants.
- Variety of methods will be employed to convene and maintain the group.

- Vendor cites compliance pending mutually agreement with the dept.
- Ongoing support and grooming along with the report submission is available prior to the presentation to joint standing committee.

F. Reports

- Vendor restated qualifications and team experience to support this requirement.

- Vendor agrees to submit all reports per requirements.

2. Staffing

- Attachment 7

- Organization of House of Languages provided.
- Services provided on demand and for specific translation services.
- The vendor will manage and monitor quality of the sub.

- Included in attachment 8.
- Job descriptions, staffing plan, and titles included.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: 1/29/24

EVALUATOR NAME: April Richmond

EVALUATOR DEPARTMENT: MECDC/WIC

3. Implementation - Work Plan

- Included in attachment 9.
- Details work areas with resources assigned and a detailed month/year timeline provided to illustrate the work and deliverable plan.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

BIDDER NAME: University of New England

DATE: 2/24/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• In-State• Experience with Maine DHHS-OFI• Survey experience• SNAP and health-related experience
2. Subcontractors
<ul style="list-style-type: none">• House of Languages for survey translation
3. Organizational Chart
<ul style="list-style-type: none">• Provided with FTEs for current project, as well as for whole organization
4. Litigation
<ul style="list-style-type: none">• Several discrimination cases settled
5. Financial Viability
<ul style="list-style-type: none">• Provided
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

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BIDDER NAME: University of New England

DATE: 2/24/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Team members trained on accessibility (ADA Section 508 standards, Web Content Accessibility Guidelines), will use Flesch-Kincaid Reading Level assessment
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
B. Communication
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Will get written approval from Department
C. TANF and ASPIRE-TANF Participant Survey
<ul style="list-style-type: none"> • RedCap system for surveys (currently being used in other OFI programs) • 20-minute surveys • Pre-test survey with small group of participants
<ul style="list-style-type: none"> • 10 days minimum for Department to review methodology
<ul style="list-style-type: none"> • Reviewed TANF enrollment numbers • Goal of 248 for current participants responding (7% response rate) and 93 past (3% response rate), 6% margin of error for current 10% margin of error for past • First round of surveys is provided to all participants for first round, second round suggested weighting • Light information on which groups may be over-sampled or why
<ul style="list-style-type: none"> • Post card with QR code and web address as only recruitment • Will be sent to participants in different languages depending on language information in DHHS demographic data • Unclear if follow-up stages include other means of communication (phone calls etc), although did mention capability for email, phone, and paper copies
<ul style="list-style-type: none"> • IRB review • \$10 gift card incentive
D. Data Collection, Analysis, and Reporting
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • SAS or SPSS software for statistical analysis of Economic Security Data

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DATE: 2/24/2024

EVALUATOR NAME: Timothy Sturtevant

EVALUATOR DEPARTMENT: Maine DHHS-OFI

<ul style="list-style-type: none"> • REDCap used for survey portion of report • Suggested interactive approach to data that would allow quicker responses to legislative questions
<ul style="list-style-type: none"> • Will help Department prep for presentation to legislature, including anticipated answers to questions • Proposed debrief session after legislative report for improvement of future reports
E. Representative Group
<ul style="list-style-type: none"> • Recruit a representative sample based on demographic data, mentioned people from different parts of the State of Maine • Random sample from lists to mitigate self-selection bias • Contact back-up invitees to ensure fully representative group
<ul style="list-style-type: none"> • No set meeting format, passed on participant input
<ul style="list-style-type: none"> • Senior Research Coordinator and Research Assistant will be available to group • Will provide technical assistance but not draft report for them • Past experience facilitating similar groups • Project Assistant available to group to assist with creation of materials (formatting, word processing, etc)
F. Reports
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
2. Staffing
<ul style="list-style-type: none"> • Provided
<ul style="list-style-type: none"> • House of Languages – translation and interpretation services as well as document translation
<ul style="list-style-type: none"> • 1.4 FTEs listed in job descriptions, 2.6 FTEs in staffing plan to cover 22-month project period
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Provided



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**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D.
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311235**

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

I, Julian Baer 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:

Julian Baer

234E06D67F834D7...

Signature

Jan-12-2024

Date



**STATE OF MAINE
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SERVICES**

**Janet T. Mills
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Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311235**

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

I, Shannon Courtois 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:

Shannon Courtois

F0A92B435E5142C...

Signature

Jan-12-2024

Date



STATE OF MAINE
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AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

I, Rainald Gervais 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:

Rainald Auguste Gervais III

CC02BCD6C90D449...

Jan-12-2024

Signature

Date



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AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

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

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

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

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

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DocuSigned by:

Melanie Messina

2BB4FEA77C674E1

Jan-12-2024

Signature

Date



STATE OF MAINE
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AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

I, April Richmond 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:

April Richmond

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Signature

Jan-12-2024

Date



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DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202311235

RFP TITLE: Data and Survey Services for State TANF and ASPIRE-TANF Programs

I, Timothy Sturtevant 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:

Timothy Sturtevant

429B085CAD9D4CE...

Signature

Jan-12-2024

Date