

State of Maine
Master Score Sheet

RFP# 202312255				
Conference Coordination and Logistical Support				
Bidder Name:		Adeo InterActive	Blackberg Group, LLC	Green Tree Event Consultants, LLC
Proposed Cost:		\$88,100.00	\$709,750.00	\$94,550.00
Scoring Sections	Points Available			
Section I: Preliminary Information	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	25.00	14.00	17.00	25.00
Section III: Proposed Services	40.00	18.00	27.00	33.00
Section IV: Cost Proposal	35.00	35.00	4.34	32.61
TOTAL	<u>100.00</u>	<u>67.00</u>	<u>48.34</u>	<u>90.61</u>

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# 202312255, Conference Coordination and Logistical Support

I. Summary

Through RFP# 202312255, the Department sought proposals for Conference Coordination and Logistical Support. Three (3) Bidders responded: Adeo InterActive, Blackberg Group, LLC, and Green Tree Event Consultants, LLC. Through the evaluation process, Green Tree Event Consultants, LLC (Green Tree) was the highest scoring Bidder and determined to provide the best value to the State of Maine.

II. Evaluation Process

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

III. Qualifications & Experience for Green Tree

- Provided three (3) relevant project examples demonstrating experience and expertise in providing these services.
- Prior work history with the State of Maine.

IV. Proposed Services for Green Tree

- Demonstrated expertise in the strategy and execution of virtual and hybrid events, as well as the coordination of audio-visual presentation with AV specialists, recording and live streaming as required.
- Plans to use in-house design team to create materials and acknowledges an understanding of the requirements and approval processes with the Department.

V. Cost

Green Tree Event Consultants, LLC proposed a cost of \$94,550.00.

VI. Conclusion

Out of 100 possible points, Green Tree scored 90.61, which was the highest point total awarded by the Evaluation Team. The strengths of Green Tree's proposal include a strong organization with relevant experience, a complete proposed scope of service, and a competitive cost proposal. The Evaluation Team has determined the proposal submitted by Green Tree Event Consultants, LLC represents the best value to the State of Maine.

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Mar-06-2024

Via Electronic Mail: Valentine@adeointeractive.com

Adeo InterActive
Christopher Valentine, CEO
3804 Greystone Drive
Austin, TX 78731

SUBJECT: Notice of Conditional Contract Award under RFP #202312255 Conference Coordination and Logistical Support

Dear Christopher Valentine,

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

- Green Tree Consultants, LLC

Green Tree Consultants, LLC received the evaluation team's highest ranking. The Department will be contacting Green Tree Consultants, 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 Green Tree Consultants, LLC. Green Tree Consultants, 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.

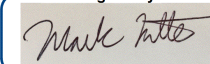
As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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:

C33FE63D652D438...

Mark Lutte
Chief Operating Officer
Office of Aging and Disability Services

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



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Mar-06-2024

Via Electronic Mail: Leanne@BlackbergGroup.com

Blackberg Group, LLC
Leanne Reisz, Executive Vice President
6433 Cygnet Drive
Alexandria, VA 22307

SUBJECT: Notice of Conditional Contract Award under RFP #202312255 Conference Coordination and Logistical Support

Dear Leanne Reisz,

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

- Green Tree Consultants, LLC

Green Tree Consultants, LLC received the evaluation team's highest ranking. The Department will be contacting Green Tree Consultants, 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 Green Tree Consultants, LLC. Green Tree Consultants, 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.

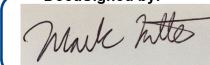
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

C33FE63D652D438...

Mark Lutte
Chief Operating Officer
Office of Aging and Disability Services

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Mar-06-2024

Via Electronic Mail: whitney@greentreeevents.com

Green Tree Event Consultants, LLC
Whitney Burdsall, Logistics Director
35 Storer Street
Saco, ME 04072

SUBJECT: Notice of Conditional Contract Award under RFP #202312255 Conference Coordination and Logistical Support

Dear Whitney Burdsall,

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

- Green Tree Consultants, LLC

Green Tree Consultants, LLC received the evaluation team's highest ranking. The Department will be contacting Green Tree Consultants, 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 Green Tree Consultants, LLC. Green Tree Consultants, 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.

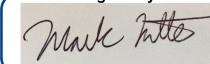
As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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:

C33FE63D652D438...

Mark Lutte
Chief Operating Officer
Office of Aging and Disability Services

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Adeo InterActive

DATE: February 26, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Craig Donnan, Ed McCloskey, Elizabeth Hopkins, Miranda Whalen,
and Alina Smith

<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	25.00	14.00
Section III. Proposed Services	40.00	18.00
Section IV. Cost Proposal	35.00	35.00
<u>Total Points</u>	<u>100.00</u>	<u>67.00</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Adeo InterActive

DATE: February 26, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Adeo InterActive

DATE: February 26, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	14.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Provided three (3) project examples including SXSW Pitch, Inventures Canada, and AARP Life Reimagined Institute (ended in 2017) and appear to be unrelated to the requirements of the RFP.• Established in 2005.• Headquartered in Texas.
2. Subcontractors
<ul style="list-style-type: none">• Proposes to utilize seven (7) staff that all appear to be subcontractors.• None of the contract resources appear to be in Maine or the Northeast.
3. Litigation
<ul style="list-style-type: none">• None
4. Financial Viability
<ul style="list-style-type: none">• Appear financially viable.
5. CEU Certification/Plan
<ul style="list-style-type: none">• Not applicable per RFP Amendment 1.
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Adeo InterActive

DATE: February 26, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	18.00

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">• Plans to communicate, provide progress updates and seek feedback.• Plans to utilize event producers with experience working with vendors.• Demonstrated experience with hosting live streaming events, and how they would shift to all virtual if needed.• Did not provide details on scheduling keynote speakers, in coordination with the National Disability Institute and Department staff or for managing and coordinating Presenters and their requirements.• Did not provide details for providing additional security as necessary, professional photography services, printing services, translation and closed captioning services, audio visual services, appropriate software applications, or supplies.• Did not describe how they plan to disseminate the information.• Did not address providing a platform for electronic early registration with technical or customer service support.• Plans to utilize a premium Dropbox account for event registrations, listserv information, and electronic invoicing within a secure platform.• Acknowledged an understanding of providing a registration plan and related requirements and summarized the key participants of the processes.• Did not address the storing and delivery of materials.• Did not provide details on how they plan to collect outreach information.• Did not address the method for facilitating the distribution of sponsorships, scholarships, reimbursements for transportation, and donations.• Did not detail how they will meet and comply with ADA requirements.
B. Reports
<ul style="list-style-type: none">• Met the requirements.
2. Staffing
<ul style="list-style-type: none">• Did not include response as separate attachments (7 or 8)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Adeo InterActive

DATE: February 26, 2024

- Provided weekly hours as time allocation for “weeks leading up to the event” but did not provide the duration of weeks.

3. Implementation - Work Plan

- Did not include response as a separate attachment (9)
- It is unclear what the timeline of tasks is.
- It is unclear who the responsible person is for certain tasks (event design discussion, registration build).
- It is unclear what work will be performed by staff and subcontractors.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Adeo InterActive

DATE: February 26, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$88,100.00	÷	\$88,100.00	x	35.00 points	=	35.00

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Blackberg Group, LLC

DATE: February 26, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Craig Donnan, Ed McCloskey, Elizabeth Hopkins, Miranda Whalen,
and Alina Smith

<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	25.00	17.00
Section III. Proposed Services	40.00	27.00
Section IV. Cost Proposal	35.00	4.34
<u>Total Points</u>	<u>100.00</u>	<u>48.34</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Blackberg Group, LLC

DATE: February 26, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Blackberg Group, LLC

DATE: February 26, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25.00	17.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Provided three (3) relevant project examples.• Over 20 years of event management experience.• Completed the same Federal Risk and Authorization Management Program (FedRAMP) approved virtual platform sourcing, registration, communications, and meeting planning steps for a variety of Federal meeting/events.• Headquartered in Virginia.
2. Subcontractors
<ul style="list-style-type: none">• None
3. Litigation
<ul style="list-style-type: none">• None
4. Financial Viability
<ul style="list-style-type: none">• Only one (1) year of financial records.
5. CEU Certification/Plan
<ul style="list-style-type: none">• Not applicable per RFP Amendment 1.
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Blackberg Group, LLC

DATE: February 26, 2024

**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments:

Part IV, Section III Proposed Services

1. Services to be Provided

Part II

A. General Requirements

- Proposed a customized strategy for each event.
- Plans to introduce innovative facilitation techniques and “unconference” event concepts for interactivity.
- Plans to develop audience personas and journey maps that help shape engagement strategies and content format.
- Demonstrated experience managing a hybrid or if needed a fully virtual event.
- Provided information of the full-service videography support they provide, including Section 508 compliance.
- Describes detailed strategy to develop streaming services, including onsite technology.
- Plans to provide a FedRamp approved platform.
- Demonstrated experience with closed captioning.
- Did not address how costs would be manage.
- Plans to provide full marketing support throughout the process, covering all materials, distribution, and web.
- Propose various software platforms for registration, data, and storage include Whova, QuickBooks, Microsoft 365.
- Propose various payment platforms managed through Eventbrite, Square, or Whova.
- Proposes to utilize their graphics team to design, produce, and manage event products.
- Did not detail how they will create, maintain, and disseminate a website, save the dates, invitations, agendas, and other materials.
- Did not address the requirements of the satisfaction surveys.
- Plans to utilize accessibility checkers and engage experts in digital accessibility to evaluate and enhance materials.

B. Reports

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Blackberg Group, LLC

DATE: February 26, 2024

- Met the requirements.

2. Staffing

- Provided position titles and job descriptions but did not mention a web development team or graphic designers described in other sections.
- Provided a staffing plan however, it is unclear if the individuals listed will only be working on this project at 40 hours a week, or if they are full time employees who cover other projects as well.

3. Implementation - Work Plan

- Provided a work plan however it includes roles not defined in the staffing plan including 'Partnerships Lead', 'Project Analyst', 'Graphics Team', 'Web Team'.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Blackberg Group, LLC

DATE: February 26, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$88,100.00	÷	\$709,750.00	x	35.00 points	=	4.34

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Green Tree Event Consultants, LLC

DATE: February 26, 2024

SUMMARY PAGE

Department Name: Health and Human Services

Name of RFP Coordinator: Brittany Hall

Names of Evaluators: Craig Donnan, Ed McCloskey, Elizabeth Hopkins, Miranda Whalen,
and Alina Smith

<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	25.00	25.00
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<u>Total Points</u>	<u>100.00</u>	<u>90.61</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Green Tree Event Consultants, LLC

DATE: February 26, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Green Tree Event Consultants, LLC

DATE: February 26, 2024

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

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

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Provided three (3) relevant project examples.• Provided an example of Autism-related summit to promote investment in innovation.• Over 100 years of combined staff experience.• Based in Saco, Maine and in operation for 25 years.• Prior work history with the State.• Experience with hosting similar size and type of conferences.• Indicated repeat clients continue to utilize the bidder's services.
2. Subcontractors
<ul style="list-style-type: none">• Provided a list of subcontractors based in Southern Maine.
3. Litigation
<ul style="list-style-type: none">• None
4. Financial Viability
<ul style="list-style-type: none">• Appear financially viable.
5. CEU Certification/Plan
<ul style="list-style-type: none">• Not applicable per RFP Amendment 1.
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided a valid certificate of insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Green Tree Event Consultants, LLC

DATE: February 26, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40.00	33.00

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">• Provided a detailed plan with frequent/needed virtual meetings to accomplish the conference goal.
<ul style="list-style-type: none">• Demonstrated expertise in the strategy and execution of virtual and hybrid events, as well as the coordination of audio-visual presentation with AV specialists, and recording and live streaming as required.• Indicated they are confident in their ability to manage costs and expenses based on their demonstrated experience in this work and their geographic proximity.• Did not specifically address each line item under managing costs associated with the Summit.• Plan to obtain the most competitive pricing for equipment, materials, and services.• Plans to use in-house design team to create materials and acknowledges understanding of the requirements and approval processes with the Department.• Did not provide proof of a secure, web-based, cloud-storage platform.• Recommends for the Summit's planned size to have a registration captain and two (2) greeters/registration staff onsite.• Will provide materials necessary, including their proprietary registration kit.• Indicated the Department is "best managed" to monitor the chat or in person commentary and behaviors. Did not address their role in this process.• Proposed options to move away from printed materials and utilize event apps, web pages and QR codes.• Did not address "all other required reports as requested by the Department".• Provided a comprehensive response with recommendations to debrief and evaluate the event.• Plans to provide an event manager's summary and financial close out.
B. Reports
<ul style="list-style-type: none">• Met the requirements.
2. Staffing

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Green Tree Event Consultants, LLC

DATE: February 26, 2024

- | |
|---|
| <ul style="list-style-type: none">• Met the requirements. |
|---|

3. Implementation - Work Plan

- | |
|---|
| <ul style="list-style-type: none">• Provided a comprehensive description of all tasks however, the timeline did not describe the person responsible, only referenced the Bidder's organization. |
|---|

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER: Green Tree Event Consultants, LLC

DATE: February 26, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$88,100.00	÷	\$94,550.00	x	35.00 points	=	32.61

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/13/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• I – prepared to provide management and facilitation of technology-related innovation conferences• I – governmental contracts appear to be with cities – Louisville, Alberta CA.• N – does not specify experience working in Maine or with Maine venues or contractors• I – conference background appears to be related to technology startups and venture capital investments and economic development
2. Subcontractors
<ul style="list-style-type: none">• P – Subcontractor/Consultants have background with conference organization.• ? – 'Subcontractor' email addresses are with the applicant company. Are they true subcontractors or employee consultants?
3. Litigation
<ul style="list-style-type: none">• P – No litigation
4. Financial Viability
<ul style="list-style-type: none">• I – Labor for the organization is all contracted staffing
5. Certificate of Insurance
<ul style="list-style-type: none">• I – Valid statement of insurance provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/13/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">• P – bidder proposes tight collaboration with the State for coordination and to research options• P – bidder proposes weekly meetings with the State
<ul style="list-style-type: none">• I – bidder has background in managing audio-video and video streaming for large scale events.• I – bidder intends to procure bids for services but has not estimated for a final budget.• I – bidder has plans to switch the program to a fully virtual platform as needed, and will coordinate and support speakers in providing conducive presentations• N – bidder does not propose or detail any planning for adaptations for hearing impaired or other disabilities, or translation requirements for Livestream sessions.
<ul style="list-style-type: none">• I – bidder proposes using three bids for external vendors to obtain competitive rates• P – bidder proposes using vendors to provide cost-sharing for the event, reducing expenses• I – bidder proposes the creation of a budget with monitoring and management of deviations
<ul style="list-style-type: none">• N – bidder proposes method for securing a location, but the Department is not requesting the bidder secure a conference location/venue.• ? – the MOU is the requested method for establishing agreements with exhibiting vendors, but the proposal indicates they will do an MOU in one sentence, and a 'contract' in another.
<ul style="list-style-type: none">• P – bidder proposes the use of a marketing team to produce materials in alignment with the Department's vision and approval processes• N – the methods to promote/disseminate/market promotional materials of the event are not proposed• I – bidder proposes the use of a secure and accessible file repository for access to materials
<ul style="list-style-type: none">• P – bidder has years of active experience with event registration, attendee management, badging and check in support.• N – bidder does not propose a strategy for a secure web-based platform for collecting payments, managing bulk email (list serv), online registration, or electronic invoicing.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/13/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

<ul style="list-style-type: none"> • I- Bidder provides file sharing through the Dropbox service.
<ul style="list-style-type: none"> • P – Bidder provides a detailed plan for support for the presenters and participants as well as prepared materials for distribution at the conference.
<ul style="list-style-type: none"> • I – bidder proposes preparation and distribution of takeaway materials
<ul style="list-style-type: none"> • I – bidder describes its role in developing materials and resources for the conference, including a website and promotional materials.
<ul style="list-style-type: none"> • I – provides a detailed plan for onsite preparation activity.
<ul style="list-style-type: none"> • P – bidder proposes strategies including Google Forms, Airtable, or SurveyMonkey to deliver satisfaction surveys to attendees
<ul style="list-style-type: none"> • I – bidder provides strategies to evaluate the conference and to collect actionable insights for improvement and future planning.
<ul style="list-style-type: none"> • I – bidder provides strategies to support the coverage of attendee costs through various donations and reimbursements.
<ul style="list-style-type: none"> • I – bidder provides communication strategies and processes to ensure Department review of all materials prior to distribution.
<ul style="list-style-type: none"> • I – Bidder will meet with the Department as requested.
<ul style="list-style-type: none"> • I – Bidder will ensure venues comply with ADA specifications.
<ul style="list-style-type: none"> • I – bidder ensures compliance with the State of Maine Digital Accessibility and Usability Policy
B. Reports
<ul style="list-style-type: none"> • P – proposes strategies to collect data and provide required reporting.
2. Staffing
<ul style="list-style-type: none"> • I – project position titles, job descriptions and qualifications, and lead (Producer) are provided, however they were not provided in the form of an Attachment 7. • P – Producer has 30 years of experience, Event Manager and Speaker Liaison has been with the firm for 14 years, and other staff have specific experience related to event planning and management.
<ul style="list-style-type: none"> • ? All staff are subcontractors. • I – bidder will ensure subcontractors will meet the requirements of the Department and the project. • N – no staff are local to Maine or demonstrate a professional network in this geography to support the project. Staff interactions will be remote other than by air travel and associated expense for in-person meetings.
<ul style="list-style-type: none"> • N – a detailed staffing plan in the form of an attachment is not provided, which would demonstrate staffing levels through the course of the preparation. Hourly time commitments are provided 'leading up to' the event, but no specificity is provided regarding time commitments through the entire course of the project.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/13/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

3. Implementation - Work Plan

- P – a detailed work plan is provided which demonstrates experience with event planning.

Part IV, Section IV. Cost Proposal

- N – staffing costs are provided in round numbers without hour commitments or a basis for estimating staffing costs.
- N – a substantial portion of the budget (18 %) is for staff travel to the event. Most contracted staff are in the south west or inter-mountain west of the US.
- N – no budget is provided for materials or supplies, website, billing services, audio-visual services, equipment rentals, marketing expenses, or a host of other costs associated with fulfilling the contract

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 02/23/24

EVALUATOR NAME: Elizabeth Hopkins

EVALUATOR DEPARTMENT: DHHS OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Been in business since 2005• Shared examples of other clients they served, including some innovation conferences they supported• Provided Descriptions of three projects they worked in the past five years<ul style="list-style-type: none">○ AARP Life Reimagined Institute○ SXSW Pitch○ Inventures
2. Subcontractors
<ul style="list-style-type: none">• Listed seven individuals that they subcontract with to do the work
3. Litigation
<ul style="list-style-type: none">• None
4. Financial Viability
<ul style="list-style-type: none">• Provided Information - Met
5. Certificate of Insurance
<ul style="list-style-type: none">• Provided - Met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 02/23/24

EVALUATOR NAME: Elizabeth Hopkins

EVALUATOR DEPARTMENT: DHHS OADS

- | |
|---|
| <ul style="list-style-type: none">• I did not see the cost proposal in the documents provided |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: February 14, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• P – Been in business since 2005 and works with a diverse group of clients in US and Canada.• I – of the three project examples, the third project has innovation as a primary scope, yet seems much larger in scale than the RFP.• I – no projects listed with the State of Maine.• I – bidders headquarters listed as in Texas.
2. Subcontractors
<ul style="list-style-type: none">• Bidder met the requirements – they have seven (7) contract resources listed in various parts of the US.• Q – none of the contract resources are located in Maine or the Northeast.
3. Litigation
<ul style="list-style-type: none">• Bidder met the requirements; response was “None”.
4. Financial Viability
<ul style="list-style-type: none">• Bidder met the requirements as Profit and Loss Statements and Balance Sheets provided for three years (2021, 2022 and 2023).• ACORD certificate of insurance dated 9/13/23 with policy EXP date for 09/06/2024 plus endorsement for General Liability Coverage.• I – no umbrella or excess liability covered; does include Professional Liability coverage.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: February 14, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

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; hold regular week meeting to facilitate communications, provide progress updates and seek feedback.• P – event producers have decades of experience working with vendors.
<ul style="list-style-type: none">• Bidder met the requirements and provided one example of transitioning to an all-virtual event.• I – Bidder will secure multiple vendor bids of services for the online portal to host live streaming (did not give examples of providers they have worked with).• I – the example listed for transitioning to an all- virtual event was not one of the three related projects provided.
<ul style="list-style-type: none">• Q – strategy is to secures at least three bids for each external vendor (did not indicate how many external vendors they anticipate they would need; they did not provide specifics or recommendations around many of the sub-bullets listed.• P – detailed budget and actual expenses will be maintained as a shared document and discussed during the weekly meetings including any deviations.
<ul style="list-style-type: none">• Bidder met the requirements; outlined the major review and approval process.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements.• P – bidder did emphasize fully understanding branding guidelines, messaging strategy and overall image the Department intends to project and a summary of the review process.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements and summarized the key participants of the processes.• I – bidder maintains a premium Dropbox account where event registrations, listserv information, and electronic invoicing can be collected within a secure platform.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements and provided more specific information related to speaker needs.• I - bidder will also contract with professional recording services for keynote presentations to ensure high-quality audio and video capture.
<ul style="list-style-type: none">• N- bidder did not acknowledge an understanding of the comments in the Q&A related to “follow-up events” and the number of copies of materials and digital access to materials.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: February 14, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

<ul style="list-style-type: none">• I – bidder will take a lead or collaborative role in the development and design of the event website.• P – materials will be discussed during weekly meetings with the Department representatives to make sure in accordance with the desired vision and branding.
<ul style="list-style-type: none">• Bidder met the requirements and provided key activities pre-event, during and post event.• I – bidder would typically arrive 2 days prior to the event and assemble a dedicated onsite coordination team.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements.• I – bidder provided a short list of platforms they could use to administer survey to the attendee list.
<ul style="list-style-type: none">• Bidder met the requirements and provided some examples relative to the bullet points above.• P – bidder will gather outreach information to understand how Participants learned about the summit and listed areas they would research.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements.• I – bidder will create a structured process for evaluating and approving applications or requests from Participants seeking financial support.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements.
<ul style="list-style-type: none">• Bidder met the requirements; traditionally meetings will employ a share Google Doc and reiterated weekly meetings.
<ul style="list-style-type: none">• Bidder met the requirements; bidder's dedicated research team will also play a crucial role researching up-to-date ADS requirements to verify venue meets the specifications before any contracts are signed.
<ul style="list-style-type: none">• Bidder met the requirements; bidder provided an overview of the quality assurance process and materials and website and registration called out as in scope.
B. Reports
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements.
2. Staffing
<ul style="list-style-type: none">• I – project manager is employee of the bidder, the others listed in the document are those listed in the contractor section above.• I – a separate attachment was not provided.
<ul style="list-style-type: none">• Bidder met the requirements and clarified the name of the contractor in the project manager role.
<ul style="list-style-type: none">• I – a separate attachment was not provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: February 14, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

- N – a list of names and the weekly hours was provided with “weeks leading up to event” that had no indication of how many weeks that is.

3. Implementation - Work Plan

- P – bulleted list of activities by Stages provided (partially met the requirement)
- N – a separate attachment was not provided.
- N – without a view of the Stages with a timeline, it is difficult to assess the calendar duration, can work in Stages overlap; and this is a stated requirement as per 3, a, i.

Part IV, Section IV. Cost Proposal

- Unclear if all the items in the RFP response was addressed in the cost proposal.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/22/2024

EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: OCFS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
• First project date ended 2017- asked to be within 5 years	
2. Subcontractors	
• Listed as requested- have experience with agency	
3. Litigation	
• None provided	
4. Financial Viability	
• Documentation provided	
5. Certificate of Insurance	
• Certificate provided	

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/22/2024

EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: OCFS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> Weekly meetings- appear to be virtual
<ul style="list-style-type: none"> Agree to meet- Provided details and have done this and provided example
<ul style="list-style-type: none"> Plan to subcontract all, or utilize department resources
<ul style="list-style-type: none"> Agreed to follow this requirement- details unclear as talks about desired locations not part of this RFP
<ul style="list-style-type: none"> Work with marketing team Secured in secure accessible repository
<ul style="list-style-type: none"> Asks that Department contract with directly for registration platforms Utilize DropBox for collecting event registration , listserv info "Electronic invoicing can be collected within a secure platform"?
<ul style="list-style-type: none"> Proposal missed this change so not addressed- answered the original about CEU
<ul style="list-style-type: none"> Agreed to this requirement except no mention of delivery of takeaway materials
<ul style="list-style-type: none"> Agree to collect and review material with the agency and take the lead in design
<ul style="list-style-type: none"> Be on site two days before event and coordinate all set up
<ul style="list-style-type: none"> Agree to this requirement- list platforms for surveys
<ul style="list-style-type: none"> Met requirement
Meets requirement- agree to provide reimbursement within 30 days, and agree to come up with a system -no details on this system or examples
<ul style="list-style-type: none"> Will utilize weekly meetings and ensure Department has reviewed and approved
<ul style="list-style-type: none"> Meets requirement
<ul style="list-style-type: none"> Talks about selected venue meeting ADA specifications, but unclear how as no specifics- states will research
<ul style="list-style-type: none"> Agree to meet this
B. Reports
<ul style="list-style-type: none"> Agree to have reports done and have real time availability of registration info shared at weekly meetings
2. Staffing
<ul style="list-style-type: none"> Provided- met requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/22/2024

EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: OCFS

• Met- will be overseen by pm
• provided
3. Implementation - Work Plan
• Provided- though unclear the length of the stages- also unclear team and position responsibilities

Part IV, Section IV. Cost Proposal
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/15/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• In business since 2005; based in Texas• Clients listed includes festivals and summits• Produced AARP Innovate conference for six years• Event producer for South by Southwest interactive conference from 2008+• Developed and produced Inventures Canada conference: three day event in innovation, research, and investing with 4500+ attendees, 6 featured tracks, 200+ sessions – 2017 to 2023
2. Subcontractors
<ul style="list-style-type: none">• Michelle Murdough – event manager; 14 years with Adeo InterActive; Texas• Adam Wode – programming manager; also works with SXSW; Texas• Shannon Gordon – meeting management/logistics; 25 years exp; Colorado• Janelle Burchfield – content programmer; Virginia• Julie Engel – pre-event logistics and office management, in-person at events; 10 years in entertainment and events; Texas• Gay Dotin – experiential manager; 25 years experience; Texas• Savannah Blomquist – marketing consultant; Utah
3. Litigation
<ul style="list-style-type: none">• None listed
4. Financial Viability
<ul style="list-style-type: none">• Provided P&L: 2023, 2022, 2021• Provided Balance Sheets: 2023, 2022, 2021
5. Certificate of Insurance
<ul style="list-style-type: none">• Expires 9/6/2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/15/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">• Highly collaborative process• Commit to holding regular weekly meetings with Department to provide updates on progress, seek feedback• Will conduct research on elements such as stage design• Will work with venue on A/V, food/beverage, internet, room setup and design, rentals, parking, and other requests.
<ul style="list-style-type: none">• Online portal to host live stream• Designate specific rooms where content will be streamed• Prepare and guide speakers• Secure multiple bids as possible; submit proposals to Department• 2.a. Provide further coaching and guidance to speakers• Event content posted online and archived for access• Will work with website programmers to integrate virtual platform into the website and that tech support is provided• Listed experience with 2-day all-virtual event with 1,300 attendees and 30 concurrent sessions/60+ speakers
<ul style="list-style-type: none">• Secure at least three bids• Work with Department to explore internal resources, in-house capabilities• Collaborate with other organizations to explore cost-sharing, reduced rates, or free services• At past events have secured volunteers for preparations and on-site support during• Budget will be maintained as a shared document for transparency and reference; deviations will be discussed and addressed promptly
<ul style="list-style-type: none">• Meet with client to review desired locations, confirm details of selected options, and will secure contracts of terms and conditions
<ul style="list-style-type: none">• Marketing team will understand branding guidelines, messaging strategy, and over all image to project• Materials will go through approval by the Department and shared during weekly meetings for feedback; will incorporate changes• Approved materials to be stored and maintained in a secure place for consistency and quick retrieval• Did not address disseminating the materials

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/15/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• Will make recommendations of registration platforms for Department to contract with directly – Adeo staff will manage• Support includes managing all inbound inquiries, managing a database of attendees, reporting attendee lists, coordinating printing of name badges/lanyard for attendees• Typically (not will) staffs and supports the check-in experience using local volunteers or temp staffing• Will use Dropbox for event registrations, listserv information, and electronic invoicing
<ul style="list-style-type: none">• Will secure speaker travel, accommodation, badge, and any other needs• Will prepare the content and different roles, points of view, of each participant – what does this mean?• Work with Dept and Presenters to plan detailed agenda, consider session durations, breaks, and interactive elements• Implement timekeeping to ensure each segment adheres to schedule – what will they do if the schedule is disrupted?• Will offer dedicated practice sessions to speakers in the physical and/or virtual environment, test technical setups, and rehearse presentations• Adeo representative will monitor online chat and in-person commentary or behaviors• Will contract with professional recording services for high-quality audio and video
<ul style="list-style-type: none">• Will work with marketing lead and Department to identify, source, and ensure materials reflect the overall vision and messaging objectives• May include: printed flyers, informational brochures, promotional items• Vendor will oversee prep and packaging, including organizing, assembling, and packaging for optimal condition
<ul style="list-style-type: none">• Will work closely and support marketing event project leads – is this someone on vendor staff or a subcontract?• Essential components including: marketing plan/activities/timeline, press releases, media outreach, marketing partners, social media engagement, graphic design (logo, printed program, signage) and website development and design• Will take lead or collaborative role in development/design of website; includes platform for information, registration, and promotional content• Materials will be collected periodically and discussed weekly with Dept
<ul style="list-style-type: none">• Will arrive early to prepare venue; set-up, prep for registration, work with venue to prep space for the event

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/15/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• Full onsite coordination by planning, designing, and deploying all signage, posters, and displays• Dedicated onsite coordination team to setup signage and work with venue staff, inspect materials to maintain appearance, address logistical challenges• During event, will manage vendors, lead attendee registration, work with Dept team on issues, manage 'run of show', address attendee issues, manage volunteers, work with speakers, manage sessions• Will work with Dept on post event close-out at the venue and return assets to stakeholders
<ul style="list-style-type: none">• Confirm overarching goal of survey and align with specific objectives• Collaborate on creation of questions and seek approval• Will use a platform such as Google Forms, Airtable, or Survey Monkey to administer• Will collect responses and summarize in a report• Will meet Dept's deadline for completion and delivery of results and reports
<ul style="list-style-type: none">• Will discuss goals and objectives with the Dept prior to the event• Evaluation will include review of event outcomes, participant engagement, and impact of the summit on the intended audience• Demographics will be collected within registration system: professional experience, industry sectors, roles, other relevant details• Gather outreach info on how Participants learned about the Summit – how will they do this?• Participants will be encouraged to provide feedback – how will they do this?
<ul style="list-style-type: none">• Establish communication channels with sponsors, outline terms and programs• Distribution plan will be developed to ensure fairness and transparency• Will create structured process for evaluation and approving applications/requests• Will maintain record-keeping and acknowledgement of donations/gifts• Will adhere to financial regulations and compliance requirements
<ul style="list-style-type: none">• Engage with Dept during weekly meetings• Will provide updates on progress of development, discuss what is in the works, and share examples, solicit feedback and preferences
<ul style="list-style-type: none">• Will participate as requested• Use shared Google Doc for agenda and central not-taking• Flexible in assuming lead or co-lead of meetings• Will provide updates, discuss progress, share documentation, seek feedback

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Adeo InterActive

DATE: 2/15/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• ADA requirements are a focal point during pre-contract discussions with venues• Will engage in detailed conversations with venue reps• Adeo research team will research up-to-date requirements to verify before contracts signed
<ul style="list-style-type: none">• Adeo research time will research and report policies and guidelines• Will develop quality assurance process including testing for accessibility and audits of the processes/materials – including website and registration process• Will communicate with speakers to ensure process is inclusive for them as well as Participants
B. Reports
<ul style="list-style-type: none">• Will design and administer participation satisfaction survey and capture data; will track, record, and summarize results• Weekly registration reports will be generated through platform and shared during weekly meetings; real-time insights; adjustments to marketing and outreach• Philanthropic reports – affirmed requirements
2. Staffing
<ul style="list-style-type: none">• With exception of Chris Valentine – these individuals are also listed in Part IV Section 2 Question 2 regarding subcontractors• All individuals are subcontractors?
<ul style="list-style-type: none">• Will conduct regular weekly meetings with each subcontractor• Project Manager will oversee all subcontractors
<ul style="list-style-type: none">• Total = 120 hours per week leading up to event
3. Implementation - Work Plan
<ul style="list-style-type: none">• Months/timeline of tasks not clear – ex: Stage 1 Work, Stage 2 Work – when is this?• Responsible person for tasks not always clear – ex: who is leading the event design discussion? Who is leading registration build?• Not clear what will be done by Adeo staff vs subcontractors

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/14/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

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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">• I – bidder brings more than 20 years of experience in event management, with background serving Federal government, Fortune 500 companies and luxury hospitality partners.• I – bidder conducts 20 annual events with the Veteran Administration's Office of Healthcare Innovation and Learning• I – bidder proposes the development of a conference package to document the goals, market research, and receipts.• I – bidder proposes securing speakers, sponsors and exhibitors.• I – bidder has experience negotiating subcontractor expenses including AV, graphic designers, event specialists and operations staff.• I – three large scale conference contracts and references are offered.
2. Subcontractors
<ul style="list-style-type: none">• N/A
3. Litigation
<ul style="list-style-type: none">• N/A
4. Financial Viability
<ul style="list-style-type: none">• I – bidder is financially viable, with positive net operating income after expenses• N – bidder did not provide forms for three past years, only one year with no explanation for the omission.
5. Certificate of Insurance
<ul style="list-style-type: none">• I – valid certificate of insurance provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/14/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">• P – innovative participant active engagement strategy is presented vs standard conference event with speaker
<ul style="list-style-type: none">• I – bidder offers presenter prep sessions, coaching, speechwriting services offered
<ul style="list-style-type: none">• I – bidder offers full coordination services for the conference
<ul style="list-style-type: none">• I – bidder describes detailed strategy to develop commercial-quality videography and streaming services, including onsite technology
<ul style="list-style-type: none">• I – bidder outlines communication plan, planning process and reporting.• I – bidder acknowledges responsibility for delivery of items a-j but no additional detail is provided• I – bidder is proposing audience preparation for participation in strategic sessions
<ul style="list-style-type: none">• I – bidder has extensive experience in establishing MOU agreements with vendors
<ul style="list-style-type: none">• I – bidder offers full marketing support pre, during and post-conference, covering all materials, distribution, and web
<ul style="list-style-type: none">• I – detailed plan and timeline is presented for registration outreach and registration services• I – a secure billing platform is provided for online billing
<ul style="list-style-type: none">• I – bidder proposes a public-relations strategy along with social media monitoring and engagements• I – bidder provides media development, advisory, outreach, media coaching, and communication with the press and other media
<ul style="list-style-type: none">• I – bidder has a network of printed materials providers to manage any order related to the conference
<ul style="list-style-type: none">• I – bidder offers graphic services for all event products• ? – website development is not mentioned as part of the deliverable• I – bidder offers onsite strategy to meet coordination requirements.
<ul style="list-style-type: none">• I – bidder focuses on invoicing rather than on satisfaction surveys or event evaluation• I – bidder offers post-event follow up with presenters and stakeholders• I – bidder proposes comprehensive evaluation plan and post-event report, with high level overview, and breakdowns of each session.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/14/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

<ul style="list-style-type: none">• Bidder proposes a cloud storage platform for tracking all financial contributions and scholarships, with system audits.
<ul style="list-style-type: none">• Bidder agrees to comply
<ul style="list-style-type: none">• Bidder agrees to comply
<ul style="list-style-type: none">• Bidder agrees to comply
<ul style="list-style-type: none">• Bidder agrees to comply
B. Reports
<ul style="list-style-type: none">• Bidder offers a comprehensive report to meet all requirements
2. Staffing
<ul style="list-style-type: none">• Bidder provides titles and job descriptions, and evidently intends to hire staff for the project
<ul style="list-style-type: none">• N/A
<ul style="list-style-type: none">• Bidder provides a staffing plan that reflects the baseline staffing time with a surge team to handle busy periods.
3. Implementation - Work Plan
<ul style="list-style-type: none">• ? – The work plan outlines roles that are not defined in the staffing plan including 'Partnerships Lead', 'Project Analyst', 'Graphics Team', 'Web Team'• ? – Graphics team and web team suggest contract staff for these specialized functions, but these are not detailed in the staffing plan or subcontractor list

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">• I – Project budgets 160 hours of staff time a week to accomplish the event plan, which represents the bulk of the budget• N – Technology services are listed as an expense but are not defined in the proposal• N – There is no budget provided for many required services and expenses for a conference such as A/V equipment, graphics design, professional video editing etc., and does not represent a comprehensive proposal to cover all expenses for the event. No accounting is evident of the procurement of the additional event services that are described in the proposal.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/23/24

EVALUATOR NAME: Elizabeth Hopkins

EVALUATOR DEPARTMENT: DHHS - OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• More than 20 years of event management• Provided examples of the kinds of experience they have managing events• Provided three examples of events they have managed in the past five years
2. Subcontractors
<ul style="list-style-type: none">• None
3. Litigation
<ul style="list-style-type: none">• None
4. Financial Viability
<ul style="list-style-type: none">• Met
5. Certificate of Insurance
<ul style="list-style-type: none">• Met

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/23/24

EVALUATOR NAME: Elizabeth Hopkins

EVALUATOR DEPARTMENT: DHHS - OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
• Met
• Met – described their experience managing a hybrid event
• Met – gave examples of how they accomplished the above in prior conferences
• Met – have experience with MOUS
• Met
• Met
• Did not describe how the CEU credits would be arranged on the front end
• Met, including ensuring 508 compliance
• Met
• Met
• Meet
• Met
• Met
• Met – although not much detail
• Met although not much detail
• Met
• Met
B. Reports
• Met
2. Staffing
• provided
• NA
• Provided – it is unclear if the individuals listed will only be working on this project at 40 hours a week, or if they are full time employees who cover other projects as well
3. Implementation - Work Plan
• Provided – although hard to read
Part IV, Section IV. Cost Proposal
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: February 16, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none">• Bidder met the requirements; provided considerable details around their more than 20 years of event management in both public and private sectors and their approach and typical responsibilities were included.• I – bidder team has completed the same FedRAMP-approved virtual platform sourcing, registration, communications, and meeting planning steps for a variety of Federal meeting/events.• P - three relevant project examples were provided within the past two years.• I – bidder did not indicate that they worked with the State of Maine before.• I – bidder headquarters is listed as in Virginia.	
2. Subcontractors	
<ul style="list-style-type: none">• Bidder met the requirement; listed "N/A"	
3. Litigation	
<ul style="list-style-type: none">• Bidder met the requirement; listed "N/A"	
4. Financial Viability	
<ul style="list-style-type: none">• Bidder did not meet the requirements of 3 years of Profit and Loss Statements and Balance Sheets as only 2023 provided.	
5. Certificate of Insurance	
<ul style="list-style-type: none">• ACORD certificate dated 9/28/23 with policy EXP dates for 9/22/24.• I – does include umbrella liability and Professional Liability.	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: February 16, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

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 and provided insights as to their approach and key milestone timeframes, for example, to coordinate work plans for events at least three months in advance per the Institute for Learning, Education and Development (ILEAD) guidance.• I – bidder listed areas they would search to develop audience personas as they work with OADS.• I – bidder has had success introducing innovative facilitation techniques for audience interactivity, some of which was shared in the project examples.• I – team manages all logistics listed in the RFP and provided summary information on the collaborate work plan creation sessions.
<ul style="list-style-type: none">• Bidder met the requirements and provided information of the full-service videography support they provide, including Section 508 compliance.• I – bidder has introduced a FedRamp-approved platform (cloud service offering, Federal authorization process) to manage all virtual registrations, etc.
<ul style="list-style-type: none">• Bidder met the requirements and acknowledged each stakeholder group; bidder also provided information for each of the bullets listed in this section.• I – bidder would work with speakers on dry runs of presentation – both virtually and onsite.
<ul style="list-style-type: none">• Bidder met requirements and share the number of MOAs, MOUs and CRADSAs they support with VHA Office of Healthcare Innovation and Learning.
<ul style="list-style-type: none">• Bidder met the requirements and provided an overview of their approach, tools they would use and key metrics they would monitor and the number of webpages their web-development team designs and supports for specific events.
<ul style="list-style-type: none">• Bidder met the requirements and provided an overview of their approach, platforms they would use.• I – bidder used Microsoft 365 for all of its secure cloud-storage and listserv needs.
<ul style="list-style-type: none">• Bidder met the requirements and provided examples on how they would approach each of the bullets listed above.
<ul style="list-style-type: none">• Bidder met the requirements and will streamline the process of procuring, preparing, storing and delivering participant materials for the Summit and follow-up events.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312255

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BIDDER NAME: Blackberg Group, LLC

DATE: February 16, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

<ul style="list-style-type: none"> • Bidder acknowledged an understanding of the requirements.
<ul style="list-style-type: none"> • Bidder met the requirements and gave examples on what they would do.
<ul style="list-style-type: none"> • Bidder met the requirements and gave examples on what they would do. • I – our team craft personalized, hand-written thank you letters as well as emailed to all speakers, presenters, facilitators and additional even stakeholders and deliver them.
<ul style="list-style-type: none"> • Bidder met the requirements and provided responses to each of the above bullets. • I – work with OADS to select the optimal evaluation tools based on Section 508 accessibility standards and preferred end user experience.
<ul style="list-style-type: none"> • Bidder met the requirements and provided an overview of how they would manage this process with their centralized, secure, cloud-based system.
<ul style="list-style-type: none"> • Bidder acknowledged an understanding of the requirements.
<ul style="list-style-type: none"> • Bidder met the requirements and indicated they would utilize accessibility checkers and engage experts in digital accessibility to evaluate and enhance materials, ensuring they are usable for all audiences, including those with disabilities.
<ul style="list-style-type: none"> • Bidder acknowledged an understanding of the requirements.
<ul style="list-style-type: none"> • Bidder met the requirements. • I – bidder will rigorously adhere to state and federal policies and guidelines, including the Digital Accessibility and Usability Policy.
B. Reports
<ul style="list-style-type: none"> • Bidder met the requirements and provided what, how and when they would share relative to each of the three reports via a comprehensive data management and reporting strategy.
2. Staffing
<ul style="list-style-type: none"> • Bidder met the requirements and listed the position title, description and position responsibilities and minimum qualifications and linkage to the work in the plan. • I - Bidder did provide a separate attachment as requested.
<ul style="list-style-type: none"> • Bidder will not be utilizing subcontractors.
<ul style="list-style-type: none"> • Bidder provided a list of roles and illustrative sample and time allocation of hours/week for the role; it was not clear how many weeks total duration for each role might be envisioned. • I – bidder maintains a surge team to help flex up hours as needed for busy periods. • I - Bidder did provide a separate attachment as requested.
3. Implementation - Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: February 16, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

- Bidder met the requirements of the work plan in a timeline chart, major activities with the responsible party listed and plan duration in weeks.
- P – timeline view helped visualize the timing of activities and which activities could overlap or run in parallel relative to the event dates.
- I – one of the last activities listed at the end of the plan is Participant Reimbursement.
- I - Bidder did provide a separate attachment as requested.

Part IV, Section IV. Cost Proposal

- Staffing hours and costs seem high and unclear how many weeks duration used in the calculations.
- Cost estimates included fringe benefits.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/22/2024

EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: CBHS

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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">• Experience working with veterans, knowledge of Fedramp platform, graphic design• Gave three examples all current- none complete- though appears the 1st has occurred	
2. Subcontractors	
<ul style="list-style-type: none">• None noted	
3. Litigation	
<ul style="list-style-type: none">• Listed as n/a	
4. Financial Viability	
<ul style="list-style-type: none">• Provided documentation	
5. Certificate of Insurance	
<ul style="list-style-type: none">• Provided and current	

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/22/2024

EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: CBHS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none"> • Examples provided • Details provided
<ul style="list-style-type: none"> • Have a platform identified and that is FedRamp approved, experience with closed captioning
<ul style="list-style-type: none"> • On the ground team of 20 to do most of this • No mention of managing costs or paying for services
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Experience with this and webpages
<ul style="list-style-type: none"> • Meets requirements, platforms used are provided
<ul style="list-style-type: none"> • Answered the removed 7 and labeled this as 8 • Meets requirements well detailed plan
<ul style="list-style-type: none"> • Guarantee arrival, connected with printers and rapid shipping if necessary
<ul style="list-style-type: none"> • Meets requirement- team of graphic designers
<ul style="list-style-type: none"> • Meets requirements-staff dedicated to this on the ground
<ul style="list-style-type: none"> • Response not specific to the reports being completed within 30 days • Reimbursement and invoicing within 1 wk after event
<ul style="list-style-type: none"> • Meets requirements
<ul style="list-style-type: none"> • Meets requirements and has experience with this
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets requirement
<ul style="list-style-type: none"> • Meets this requirement
<ul style="list-style-type: none"> • Have a process for review and familiar with requirements
B. Reports
<ul style="list-style-type: none"> • Detailed information on meeting these requirements
2. Staffing
<ul style="list-style-type: none"> • Provided and detailed
<ul style="list-style-type: none"> • None noted
<ul style="list-style-type: none"> • Provided and plan for additional if needed
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Clear timeline with responsible party identified
Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/16/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

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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">• 20+ years of experience• Supports VA's Office of Healthcare Innovations and Learning events including multi-day conferences with 800+ attendees• Experience sourcing speakers• Listed familiarity with multiple tech tools such as Whova, Sprout Social, and Muck Rack for event platforms and marketing tools• Experience coordinating onsite AV for hybrid events; referenced FedRAMP-approved virtual platform sourcing and closed captioning on video footage• Blackberg's staff design, produce, and manage all onsite products such as signage, banners, exhibits, branded notepads, stage backgrounds• All three projects listed are for Veterans Health Administration VHA – two projects still in process
2. Subcontractors
<ul style="list-style-type: none">• None listed
3. Litigation
<ul style="list-style-type: none">• None listed
4. Financial Viability
<ul style="list-style-type: none">• Balance Sheets: 2023, Profit and Loss: 2023• Did not provide three years of Balance or P&L
5. Certificate of Insurance
<ul style="list-style-type: none">• Provided – expires 9/22/2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Blackberg Group, LLC

DATE: 2/16/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">• Will develop audience personas and journey maps that help shape engagement strategies and content format through Google Analytics, Sprout Social and Muck Rack – what data are they looking at through these platforms?• Will introduce innovative facilitation techniques and “unconference” event concepts for interactivity• Other areas of support include project management, venue liaison support, AV and IT coordination, speaker identification, site location research, facility reservation, onsite meeting and registration support, editorial services, exhibit diagramming, and event evaluation• Will coordinate work plans at least three months in advance• Will develop and distribute information to traveler documents• Blackberg team manages logistics including AV, registration, banquet event orders, broadcast/video, and exhibits• Experience with 70+ speakers across five breakout spaces• Also offers prep sessions, speechwriting, and coaching sessions• Experience coordinating and securing Government leadership for events
<ul style="list-style-type: none">• Full-service videography support; Averages production of 75 videos quarterly• Will develop action plan for livestreaming – goal, video tone, style, length, and format• Capture live event photography, interview attendees, and capture post-event multi-media content• Videographers ensure editing to commercial-quality, including color, sound, closed captioning, animations, and Section 508 compliance.• Support informational graphics and motion graphics to enhance footage• Coordinates onsite AV for hybrid events• Used FedRamp-approved platform RegFox to manage all virtual registrations and offer technical support at virtual events and drive traffic to websites• Web development team produced live stream with chat feature for live tech support; Stream included live closed captioning according to S508• Within one week, conducted closed captioning QA review of all videos and published each session for post-event reach

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EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• For virtual meetings with clients, uses FedRamp-approved meeting platform Whova to manage registration process, offer technical support, and facilitate Q&A during events• Some of their answers are in the past tense
<ul style="list-style-type: none">• Did not address how they will manage costs
<ul style="list-style-type: none">• Will research vendors for good standing and value and present them to the Department for approval• Blackberg has MOU templates that can be used or customized• Has experience supporting memorandums of agreement, memorandums of understanding, and cooperative research & development agreements for the Veterans Health Administration Office of Healthcare Innovation and Learning
<ul style="list-style-type: none">• offers communications support including social media, media relations, email marketing, direct stakeholder outreach, and speaking engagement support.• Support branding and environmental design of event spaces, including wayfinding signage, retractable banners, exhibits, branded notepads, stage backgrounds• Support design and development of marketing materials, videos flyers, social media, email, press releases, and associated communications products• Web development team designs, develops, and maintains event-specific sites• Answer does not go into detail on how they will create, maintain, and disseminate these materials
<ul style="list-style-type: none">• Blackberg will send save-the-dates, followed by virtual and in-person registration links with technical support and analytics reports• Software platforms for registration, data, and storage include Whova, QuickBooks, Microsoft 365,• Payments managed through Eventbrite, Square, or Whova• Onsite team runs onsite registration table
<ul style="list-style-type: none">• Agenda planning and timekeeping to ensure each segment flows seamlessly and aligns with the event objectives. No additional details on how this is supported.• Practice sessions supported to provide speakers the opportunity to refine their presentations and adapt to feedback. No additional details, such as timing of the practice sessions, how this will be facilitated in coordination with a virtual or hybrid event.• Team will monitor chat to engage with the audience, address questions. No detail on in-person behaviors• Recording services includes event media advisory, direct media outreach, reporter follow-up, media coaching, and media interviews

**STATE OF MAINE
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DATE: 2/16/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• Team edits content of full-length speaker videos, attendee testimonials, social media clips, and project overview videos• Blackberg completes closed captioning, transcript creation, and 508 compliance
<ul style="list-style-type: none">• Development scheduled to guarantee arrival a week before the event and rapid shipping if needed. No detail on handling of the shipped package once it arrives in Maine.• Will use network of trusted printers and goods providers for the order. No detail on whether these trusted providers are located in Maine• No detail on where materials will be stored while being compiled for the event
<ul style="list-style-type: none">• Blackberg's graphic designers and event specialists responsible for designing, producing, and managing all onsite products.• How will the onsite materials be collected and reviewed?• No answer to how they will create, maintain, and disseminate a website, save the dates, invitations, agendas, and other materials.
<ul style="list-style-type: none">• Blackberg team will design, produce, and place all onsite materials• Offer onsite support and address any signage needs or adjustments• Post-event, will manage removal of all materials
<ul style="list-style-type: none">• Did not answer the question about satisfaction surveys
<ul style="list-style-type: none">• Will collaborate with government to design evaluation framework that outlines the key components for assessment• Evaluation tool will be selected based on 508 standards and end-user experience. Have used custom-built webpage and Survey Monkey for similar events.• Survey administered via end of summit communication and post-event emails• Will provide high-level overview followed by detailed breakdowns of the results; will present full report, answer questions, discuss recommendations, and document findings
<ul style="list-style-type: none">• Has a centralized, secure, cloud-based system for tracking and managing funds. Tracks sources, amounts, donor information, and intended use• Regularly audit the system to ensure accuracy• Have established form templates to collect key information• Automatic notification of the status of participant compensation requests and ensure timely reimbursement schedules
<ul style="list-style-type: none">• Will use pre-vetted timeline and schedule to be managed by Project Lead
<ul style="list-style-type: none">• Will use pre-vetted timeline and schedule to be managed by Project Lead
<ul style="list-style-type: none">• Will assess to ensure compliance with ADA specifications and applicable laws

**STATE OF MAINE
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DATE: 2/16/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• Includes access points, seating arrangements, restroom facilities, and any necessary accommodations• Will collaborate with venue management for modifications or enhancements
<ul style="list-style-type: none">• Detailed review process where all materials are designed and vetted to ensure they meet accessibility standards• Will utilize accessibility checkers and engage experts in digital accessibility to evaluate and enhance materials
B. Reports
<ul style="list-style-type: none">• Met requirements
2. Staffing
<ul style="list-style-type: none">• Event Project Manager; Event Deputy PM; Event Specialist; Event Coordinator; Communications Specialist• No mention of web development team or graphic designers described in other sections
<ul style="list-style-type: none">• No subcontractors
<ul style="list-style-type: none">• Provided sample with estimated time allocation = 160 hours/week total• Maintain team to flex up hours as needed
3. Implementation - Work Plan
<ul style="list-style-type: none">• Not all responsible parties explained – who are the project lead, partnerships lead, project analyst, graphics team, web team
Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/15/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience	
1. Overview of the Organization	
<ul style="list-style-type: none">• Bidder has over 100 years of combined staff experience• Bidder is based in Saco, Maine, and has operated for 25 years• Bidder has done work for SOM previously• Bidder has served autism-related events• Bidder has run similar sized conferences to the proposed	
2. Subcontractors	
<ul style="list-style-type: none">• Proposes AV Technik LLC for Audio Visual presentation services	
3. Litigation	
<ul style="list-style-type: none">• N/A	
4. Financial Viability	
<ul style="list-style-type: none">• Bidder has provided necessary forms for three years and has financial viability	
5. Certificate of Insurance	
<ul style="list-style-type: none">• Bidder has provided a valid statement of insurance	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/15/2024

EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">• P – Bidder provided a detailed work plan to accomplish the conference goal with frequent/needed virtual meetings to accomplish the goal
<ul style="list-style-type: none">• I – Bidder expresses significant expertise in the strategy and execution of virtual and hybrid events, as well as the coordination of audio-visual presentation with AV specialists, and recording and live streaming as required.
<ul style="list-style-type: none">• P – Bidder expresses confidence in their ability to manage costs and expenses based on experience in this work and geography.• P – Bidder will obtain the most competitive pricing for equipment, materials, and services.
<ul style="list-style-type: none">• I – Bidder has a sponsor/vendor registration system which includes a contract/MOU process.
<ul style="list-style-type: none">• I – Bidder will work with the Department to determine promotional material needs as well as marketing for the conference through distribution channels.
<ul style="list-style-type: none">• P – Bidder has experience with online registration platforms and will provide a web interface for registration and payment, as well as for conference information.• I – Bidder will manage all customer inquiries, communications, and payment processing.• I – Bidder will provide an appropriate number of staff to accomplish this objective.
<ul style="list-style-type: none">• P – Bidder provides comprehensive responses to each of the four specific support domains listed.
<ul style="list-style-type: none">• I – Bidder proposes electronic delivery of conference materials through various strategies, including web resource or online drive or folder
<ul style="list-style-type: none">• P – Bidder proposes a website for up to six pages covering the essential aspects of the event. Bidder will cover costs for the website, as well as the design of the site.
<ul style="list-style-type: none">• I – Bidder will provide signage and staff resources on the event days to support wayfinding and support. Signage will be provided by the bidder at no cost.
<ul style="list-style-type: none">• I – Bidder will provide and manage satisfaction surveys and their collection and summarization
<ul style="list-style-type: none">• I – bidder proposes post-event debrief sessions, and more in-depth evaluation once the participant survey is complete

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

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EVALUATOR NAME: Craig Donnan

EVALUATOR DEPARTMENT: OADS

<ul style="list-style-type: none">• I – bidder proposes an event manager’s summary as well as financial close out information
<ul style="list-style-type: none">• I – Bidder proposes a database to track these dimensions with coordination with the Department
<ul style="list-style-type: none">• I – bidder will comply with this requirement
<ul style="list-style-type: none">• I – bidder will comply with this requirement
<ul style="list-style-type: none">• I – bidder will comply with this requirement
<ul style="list-style-type: none">• I – bidder will comply with this requirement
B. Reports
<ul style="list-style-type: none">• I – bidder will comply with this requirement
2. Staffing
<ul style="list-style-type: none">• I – bidder provided evidence of highly qualified staff to facilitate the event
<ul style="list-style-type: none">• I – bidder anticipates an AV subcontractor that will be included in the budget and be managed by the bidder
<ul style="list-style-type: none">• I – bidder provides a staffing plan with a break-down of responsibilities for each element of the event management
3. Implementation - Work Plan
<ul style="list-style-type: none">• P – a comprehensive work plan with timeline, tasks and accountabilities is provided

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">• P – a budget is provided which reasonably accounts for staffing, as well as other costs, including AV and website expenses, as well as software services that would be required for the event.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/23/24

EVALUATOR NAME: Elizabeth Hopkins

EVALUATOR DEPARTMENT: DHHS OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">Met – Good overview – based in Maine and experience supporting many events in Maine, including for the state – one of the examples they shared was supporting an Autism Investor Summit! Other two examples are in Maine and NH
2. Subcontractors
<ul style="list-style-type: none">Two of them - Based in Southern Maine -
3. Litigation
<ul style="list-style-type: none">None
4. Financial Viability
<ul style="list-style-type: none">Met
5. Certificate of Insurance
<ul style="list-style-type: none">Met

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/23/24

EVALUATOR NAME: Elizabeth Hopkins

EVALUATOR DEPARTMENT: DHHS OADS

Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. General Requirements
<ul style="list-style-type: none">Clearly outlined who they would meet this
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met – good detailed description
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met – clear ideas about how to de brief and evaluate the event
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">
<ul style="list-style-type: none">Described a clear suggested meeting cadence
<ul style="list-style-type: none">Met
B. Reports
<ul style="list-style-type: none">Met
2. Staffing
<ul style="list-style-type: none">Met – staff live in Maine!
<ul style="list-style-type: none">Met
<ul style="list-style-type: none">Met
3. Implementation - Work Plan
<ul style="list-style-type: none">Met – comprehensive work plan provided
Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: February 20, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

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

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none">• Bidder met requirements and provided key points on their history and related work experience.• I – in business for over 25 years, worked on projects in New England and have worked with some Offices in the State of Maine.• I - clients continue to utilize the bidders services year after year and hope to earn our business; this was reiterated in the three, related project examples provided (have renewals)• I – Headquarters in Maine.
2. Subcontractors
<ul style="list-style-type: none">• Bidder met the requirements and provided information on the two subcontractors that would be part of the project.
3. Litigation
<ul style="list-style-type: none">• Bidder met the requirements; indicated "None".
4. Financial Viability
<ul style="list-style-type: none">• Bidder met the requirements; provided three years of Profit & Loss Statements and Balance Sheets (2021, 2022 and 2023).
5. Certificate of Insurance
<ul style="list-style-type: none">• Bidder met the requirements; ACORD certificate dated 2/5/25 with policy EXP dates of 1/15/2025.• I – Umbrella Liability coverage and Workers Compensation coverage per statute.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: February 20, 2024

EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

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 and provided a robust listing of services bidder will provide to create a successful event.• I – Ensure ADS accessibility for all even components and execution.• I – up to 6 pages of website creation and management.
<ul style="list-style-type: none">• Bidder met requirements and listed a variety of virtual and hybrid platforms they have experience with.• I – depending on the final video quality and requested and the number of videos, editing of videos may take 7 – 21 days before being available publicly.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements at a high-level.• N – bidder did not provide specific responses for each bullet in the section above.
<ul style="list-style-type: none">• Bidder met the requirements; will design an online sponsor/vendor registration system that includes a vendor 'contract' to be drafted by bidder and approved by the Department.
<ul style="list-style-type: none">• Bidder acknowledged an understanding of the requirements and approval processes with the Department.
<ul style="list-style-type: none">• Bidder met the requirements and provided specifics responses to the bullets in the section above.• I – bidder recommendation for the Summit's planned size is to have a registration captain and 2 greeters/registration staff onsite.• I – bidder will provide materials necessary, including their proprietary kit.
<ul style="list-style-type: none">• Bidder met the requirements and provided specifics responses to the bullets in the section above.• I – recommend 'session monitors' to make sure presenters stay on time by giving 10- and 5-minute warnings before the session's end.• I – Bidder can provide recommendations for live event chat platforms, and that this is best managed by a Department representative.• I – depending on the final video quality and requested and the number of videos, editing of videos may take 7 – 21 days before being available publicly.
<ul style="list-style-type: none">• Bidder met the requirements and summarized the key deliverables they would provide and by the number of days prior to the Summit.
<ul style="list-style-type: none">• Bidder met the requirements and summarized responses.• I – up to 6 pages (listed the pages) of website creation and management.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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DATE: February 20, 2024

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EVALUATOR DEPARTMENT: OADS

<ul style="list-style-type: none"> • I – hard cost of website including domain name, hosting, SSL certificate and email subscription will be passed through at cost [cost] as an expense of the Summit with no markup.
<ul style="list-style-type: none"> • Bidder met the requirements and summarized their approach.
<ul style="list-style-type: none"> • Bidder met the requirements; would draft surveys prior to the event and then refine to request within 24 – 48 hours of the event.
<ul style="list-style-type: none"> • Bidder met the requirements and provided specifics on groupings of the bullets listed above. • I – as part of the close-out of the event, bidder will provide an event manager's summary which includes survey results, the results of a SWOT analysis on the event, financial reconciliation and bidders' recommendation for next steps.
<ul style="list-style-type: none"> • Bidder met the requirements and will distribute approved reimbursement payments with 5 – 7 business days of approval; expedited processing can be arranged if necessary.
<ul style="list-style-type: none"> • Bidder acknowledged an understanding of the requirements.
<ul style="list-style-type: none"> • Bidder met the requirements; would recommend starting with monthly meetings and moving to weekly meeting March – May 2025.
<ul style="list-style-type: none"> • Bidder acknowledged an understanding of the requirements.
<ul style="list-style-type: none"> • Bidder acknowledged an understanding of the requirements.
B. Reports
<ul style="list-style-type: none"> • Bidder met requirements and provided additional information on timeframes and usage of weblinks for the three types of reports.
2. Staffing
<ul style="list-style-type: none"> • Bidder met requirements; provided pictures of staff, job description, experience/qualifications and role in the project. • I – bidder did provide an attachment as requested.
<ul style="list-style-type: none"> • Bidder met requirements; anticipates AV subcontractor and how they would be managed and paid by the bidder at cost with no markup to Department. • I – bidder did provide an attachment as requested.
<ul style="list-style-type: none"> • Bidder provided the names for the roles in the project and a percentage of the total project time required; there was no weekly average estimate or number of weeks in total by role. • I – bidder did provide an attachment as requested.
3. Implementation - Work Plan
<ul style="list-style-type: none"> • Bidder provided a listing of activities and entity or entities (including the AV subcontractor) responsible by month and calendar year.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Ed McCloskey

EVALUATOR DEPARTMENT: OADS

- | |
|--|
| <ul style="list-style-type: none">• N -This approach did not provide a visualization of the activities over a timeline view or which activities could overlap or run in parallel; it did not have the person or position listed as requested.• I – bidder did provide an attachment as requested. |
|--|

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">• Cost breakouts aligned with work plan and tasks in the bidder proposal, including breakouts of technology services and software.• Costs did not contain fringe benefit costs.• Based in Saco, Maine so travel expenses listed are mileage and parking.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/23/2024

EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: CBHS

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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">Detailed description3 relevant current projects
2. Subcontractors
<ul style="list-style-type: none">Listed audio visual
3. Litigation
<ul style="list-style-type: none">None provided or noted
4. Financial Viability
<ul style="list-style-type: none">Provided
5. Certificate of Insurance
<ul style="list-style-type: none">Provided and current

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/23/2024

EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: CBHS

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
	<ul style="list-style-type: none"> • Provided list of services- hired service providers – what will be hired and what will be in house • Nothing specific to registration in this list
	<ul style="list-style-type: none"> • Will work with venue or subcontract audio visual • Experience with virtual hosting
	<ul style="list-style-type: none"> • Unclear if any are done in house and response was general appears most will be contracted out
	<ul style="list-style-type: none"> • Will be online system, general response • a. meets requirement
	<ul style="list-style-type: none"> • Inhouse design team, meets requirement
	<ul style="list-style-type: none"> • Registration details appear extensive- does not provide the platform to be used • Recommends volunteer for onsite in addition will have 3 of their staff
	<ul style="list-style-type: none"> • Recommend the department provide monitors for breakout session • C. recommend that the department does this, and will provide recommendations for platforms • Video could take up to 21 days to be available
	<ul style="list-style-type: none"> • No plan given for printed materials- digital materials
	<ul style="list-style-type: none"> • 6 page website- pass on expense to department • Will work with the department to determine the rest
	<ul style="list-style-type: none"> • Meet requirements- again mentions volunteers to help provide direction
	<ul style="list-style-type: none"> • Agree to meet for the survey results no mention of other required reports
	The agency will customize to department requirements
	Meets requirements (specifies with in 5 -7 days)
	<ul style="list-style-type: none"> • Meets requirement
	<ul style="list-style-type: none"> • Meets requirements- suggests meeting schedule (initially monthly)
	<ul style="list-style-type: none"> • Agree to meet requirement with Department, unclear of knowledge and experience with this
	<ul style="list-style-type: none"> • Agree to meet requirement but appears unfamiliar with these regulations (“look to the expertise of the Department”)
B. Reports	
	<ul style="list-style-type: none"> • Meets requirement
2. Staffing	
	<ul style="list-style-type: none"> • Job descriptions minimal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

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EVALUATOR NAME: Alina Smith

EVALUATOR DEPARTMENT: CBHS

<ul style="list-style-type: none">• General response- audio visual, but agree to manage others as necessary
<ul style="list-style-type: none">• Met requirement but provided % of project time but no total so that actual time could be determined
3. Implementation - Work Plan
<ul style="list-style-type: none">• Timeline provided but not detailed to the point of staff- only the department and contractor

Part IV, Section IV. Cost Proposal
<ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/22/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

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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">• Created in 2001 with special expertise in marketing, engagement strategy, technology, sales and best practices• Have worked with the Maine Office of Tourism, the Maine Office of Outdoor Recreation, and the Maine Department of Labor• Experience throughout New England including the Maine Small Business Development Center, Maine New England Made Giftware & Specialty Food Show, and human resources conferences in New Hampshire and Vermont• Expanded the New England Made show to include wholesale online and a related podcast• Full-service team with reputation as top-quality provider in the marketplace; mutual relationships and recurring events• Autism Investor Summit for service providers, investors, and key stakeholders – attendance is about 400 with networking receptions, meetings, keynote speakers, general sessions and awards• Maine Office of Tourism's Governor's Conference – have been involved since 2017; attendance is about 250-500• Granite State HR Conference involvement since 2010; noted that the event was not meeting financial goals when they were brought on board, and have since rebuilt the budget and grown the financial reserves of the committee as well as expanded the conference to a day and a half with opportunities for learning and networking
2. Subcontractors
<ul style="list-style-type: none">• AV Technik LLC – Ian Clark; Maine• Headlight Audio Visual – Dave Coffin; Maine
3. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

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BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/22/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• None listed
4. Financial Viability
<ul style="list-style-type: none">• Balance Sheets: 2023, 2022, 2021• Profit and Loss: 2023, 2022, 2021
5. Certificate of Insurance
<ul style="list-style-type: none">• Provided – expires 1/15/2025

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RFP TITLE: Conference Coordination and Logistical Support

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DATE: 2/22/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

Part IV, Section III Proposed Services	
1. Services to be Provided	
Part II	
A. General Requirements	
<ul style="list-style-type: none"> Services span pre-event planning, expense management, management of hired services, creation and management of website, graphic design and management of materials, sponsor/exhibitor management, speaker logistics, day-of event management, and post-event survey and evaluation 	
<ul style="list-style-type: none"> Will work with venue and/or subcontract audio visual services, including stage décor and lighting, room lighting, speaker presentation management, technical rehearsals, and recording of sessions Final editing may take 7-21 days before public availability Experience in virtual and hybrid events, including livestream services; related platforms used include Livestream, Vimeo, Airmeeet, Pheedloop, Hopin, and Remo Green Tree will recommend best option based on needs and budget Green Tree will build, maintain and service the chosen platform and/or streaming option 	
<ul style="list-style-type: none"> Budget by realistically allowing room in expense lines and planning conservatively on revenue Use relationships with service providers to obtain competitive pricing Will work with the Department to establish the budget with detailed breakouts; will request cost estimates for all services and supplies and ensure costs are in line with budget and approved before proceeding 	
<ul style="list-style-type: none"> Will design online registration system that includes the vendor contract to be approved by the Department Suggested that Green Tree can provide the link to the site once a vendor is approved, or vendors can pre-register and the Department will approve for finalization 	
<ul style="list-style-type: none"> In-house graphic design experience and will work with Department's existing contractors and/or preferred vendors All designs and costs to be approved before proceeding Plan for dissemination will depend on Department's marketing assets – Green Tree will work with the Department to identify available assets and strategize additional distribution strategies 	
<ul style="list-style-type: none"> Experience building, maintaining and servicing a custom registration site Green Tree will address inquiries, communications as approved, and payment processing 	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none">• Onsite registration at a minimum includes 1 registration captain and 2 greeters/staff – with potential for additional volunteers with minimal responsibilities• Will provide registration materials including badges, welcome packs, and technology for the in-person registration desk
<ul style="list-style-type: none">• A. Will work with Department to design the script and timeline, work with presenters and AV staff, and recommend handling of session timing• B. Will gather requests for and timing of rehearsals, virtual or in-person; will also gather headshots, bios, ADA requests, and other needs• C. Can provide recommendations on live event chat platforms and how to best moderate and provide security and control• D. Will coordinate with AV subcontractor for all recordings; editing may take 7-21 days
<ul style="list-style-type: none">• Can use webpage, online drive or folder, or existing resources to catalog and store materials• Will send email to attendees 10 days and 2 days prior to the event with details, reminders, and links to materials to view/download• For sustainability, have moved away from printed materials and use event apps, web pages and QR codes; Green Tree can assist with these tools as needed
<ul style="list-style-type: none">• Will design and maintain a custom website with up to 6 pages• Will work with Department to determine material needs, content design and production• Can use in-house graphic design or Department contractor/preferred vendors• All costs to be approved before proceeding• Dissemination will depend on Department's marketing assets; Green Tree will work with Department to identify assets and create distribution strategy
<ul style="list-style-type: none">• Will design, produce and install signage; typically uses a signage map for locations of branding• Signage will be approved and costs passed through with no markup• Green Tree staff and/or volunteers might be needed to provide direction to attendees
<ul style="list-style-type: none">• Will draft surveys prior to the event so can be deployed immediately• Green Tree to design and distribute to attendees, send reminder emails, and provide summary and all data to the Department
<ul style="list-style-type: none">• A, B, C: Recommends and leads a post-event debrief with event planning team to capture stand-out wins and misses, then follow with the in-depth evaluation of the participant survey

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312255

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BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/22/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

<ul style="list-style-type: none"> • E, F, G: Will customize the survey per Department's goals • D and H: Will provide event manager's summary with survey results, SWOT analysis, financial reconciliation, and recommendations for next steps
<ul style="list-style-type: none"> • A. will create database to track details and deliverables, provide reporting, tracking, and status updates • B. Once reimbursements approved, will distribute payments within 5-7 business days – expedited processing can be arranged
<ul style="list-style-type: none"> • Will identify person(s) responsible for final approvals and ensure their approval is obtained in writing • Materials will be cataloged and stored in a shared folder with restricted access
<ul style="list-style-type: none"> • Will provide event manager's report, meeting agenda, and planning timeline status report 24-36 hours prior to meetings • Post meeting notes and action items distributed within 24 hours after the meeting • Meetings typically held virtually via Zoom, Teams, or Google Meet. • Frequency depends on need and progress of the planning timeline, with more frequent meetings as the event draws closer
<ul style="list-style-type: none"> • Will work with Department and agencies to conduct an ADA audit of the event, coordinate adaptations, considerations, and other needs
<ul style="list-style-type: none"> • Will work with Department to ensure compliance with federal policies and guidelines
B. Reports
<ul style="list-style-type: none"> • A. Survey results will be summarized and provided in full – usually available within 7-10 business days • B. Registration services include custom, automated reports at the frequency requested • C. A database will be created and Green Tree will provide custom reporting, tracking, and status reports • If there are any conflicts with timeline for reporting, Green Tree will notify the Department and work to adjust the frequency/timeline
2. Staffing
<ul style="list-style-type: none"> • Managing Partner/Project Lead; Logistics Director/Project Lead; Business Development and Sales; Marketing and Event Coordinator
<ul style="list-style-type: none"> • Anticipates AV subcontractor – will solicit estimates and contract with the provider with most competitive services that meet the needs/objectives of the summit • Subcontracted company will be managed entirely by Green Tree, and can pass through the costs with no markup

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312255

RFP TITLE: Conference Coordination and Logistical Support

BIDDER NAME: Green Tree Event Consultants, LLC

DATE: 2/22/2024

EVALUATOR NAME: Miranda Whalen

EVALUATOR DEPARTMENT: DHHS-OADS

- | |
|---|
| <ul style="list-style-type: none">• Managing Partner = 20%; Logistics Director = 50%; Business Development = 15%; Marketing & Event Coordinator = 15%• Included description of service provided by each staff member |
|---|

3. Implementation - Work Plan

- | |
|---|
| <ul style="list-style-type: none">• Timeline displayed by month• Timeline doesn't describe the person responsible – only GTEC• Timeline does not note subcontractor tasks |
|---|

Part IV, Section IV. Cost Proposal

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



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312255
RFP TITLE: Conference Coordination and Logistical Support**

I, Craig Donnan 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:

Craig Donnan

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Signature

Feb-12-2024

Date



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312255
RFP TITLE: Conference Coordination and Logistical Support**

I, Elizabeth Hopkins 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:

Elizabeth Hopkins

B4C715184EB64F1...

Signature

Feb-12-2024

Date



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312255
RFP TITLE: Conference Coordination and Logistical Support**

I, Ed McCloskey 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:

Ed McCloskey

516D0BBC16754DC...

Signature

Feb-12-2024

Date



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312255
RFP TITLE: Conference Coordination and Logistical Support**

I, Alina Smith 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:

Alina Smith

B82EE1B1D26442D...

Signature

Feb-12-2024

Date



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

**Janet T. Mills
Governor**

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

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312255
RFP TITLE: Conference Coordination and Logistical Support**

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

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

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

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

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

DocuSigned by:

Miranda Whalen

47FA02C8A50048D...

Signature

Feb-12-2024

Date