

State of Maine
RFP / Proposal Master Score Sheet

Instructions: Complete the Master Score Sheet below providing all of the requested information for each bidder that submitted a proposal in response to the RFP. This document is to be included in the Selection Package submitted to the Division of Procurement Services for review/approval.

SCORESHEET FOR RFP# 201902021: Consulting Services for Organizational Development									
PROPOSAL SUBMITTED BY:		BCG		CBS		DME-CI		HRSS-CG	
COST:		Cost:	\$1,042,625	Cost:	\$106,250	Rejected – See Team Consensus Notes		Rejected – See Team Consensus Notes	
EVALUATION ITEM	POINTS AVAIL.								
Section I: Organization Qualifications and Experience	50	45		27					
Section II: Proposed Services	25	24		13					
Section III: Cost Proposal	25	1.3		13.2					
TOTAL	<u>100</u>	<u>70.3</u>		<u>53.2</u>					
PROPOSAL SUBMITTED BY:		LACC		LE					
COST:		Rejected – See Team Consensus Notes		Cost:	\$55,900	Cost:	\$125,800	Cost:	\$271,408.95
EVALUATION ITEM	POINTS AVAIL.								
Section I: Organization Qualifications and Experience	50			25		34		40	
Section II: Proposed Services	25			4		20		22	
Section III: Cost Proposal	25			25		11.1		5.2	
TOTAL	<u>100</u>			<u>54</u>		<u>65.1</u>		<u>67.2</u>	



STATE OF MAINE
Department of Administrative and Financial Services
Office of Information Technology

Janet T. Mills
Governor

Kirsten LC Figueroa
Commissioner

AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:

vlittlefield@luminadvantage.com

Victoria Littlefield
Lumin Advantage Consulting Company
1842 Alameda Street
St. Paul, Minnesota 55113

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Victoria Littlefield:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Brimstone Consulting Group LLC

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

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

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

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

Sincerely,

A handwritten signature in blue ink, appearing to read "Fred Brittain", with a large, sweeping flourish above the name.

Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

STATEMENT OF APPEAL RIGHTS

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



STATE OF MAINE
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Kirsten LC Figueroa
Commissioner

AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:
Steve@leaneast.com

Steven A. Musica
Lean East
74 Orion St.
Brunswick ME, 04011

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Steven A. Musica:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

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Kirsten LC Figueroa
Commissioner

AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:

ammoretti@moretticonsultingllc.com

Anne M. Moretti
Moretti Consulting, LLC
P.O. Box 470
Orchard Park, NY 14127

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Anne M. Moretti:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely,

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Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

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Commissioner

AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:

cpfeffer@brimstoneconsulting.com

Charles Pfeffer
Brimstone Consulting Group LLC
48 Washington Street
Camden, ME 04843

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Charles Pfeffer:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

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AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:
deborah@thewathengroup.com

Deborah Wathen Finn
The Wathen Group LLC
7 Twombly Court
Morristown, NJ 07960

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Deborah Wathen Finn:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely,

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Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

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Governor

Kirsten LC Figueroa
Commissioner

AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:
birish2@maine.rr.com

Barbara Irish
Consulting for Business Success
4 Quarterdeck Lane
Scarborough, ME 04074

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Barbara Irish:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely,

A handwritten signature in blue ink, appearing to read "Fred Brittain". The signature is fluid and cursive, with a large loop at the end.

Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

STATEMENT OF APPEAL RIGHTS

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Commissioner

AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:

suzanhochstetler@curiumsolutions.com

Suzan Hochstetler
DME Consulting International, LLC (DBA Curium Solutions)
3218 E Colonial Drive Suite G
Orlando, Florida, 32803

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Suzan Hochstetler:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely,

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Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

STATEMENT OF APPEAL RIGHTS

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STATE OF MAINE
Department Of Administrative And Financial Services
Office of Information Technology

Janet T. Mills
Governor

Kirsten LC Figueroa
Commissioner

AWARD NOTIFICATION LETTER

June 7, 2019

Via Electronic Mail:

kgregory@hrssconsultinggroup.com

Karen Gregory
HRSS Consulting Group, LLC
1970 Michigan Ave, Bldg D
Cocoa, FL 32922

SUBJECT: Notice of Conditional Contract Award under RFP# 201902021 - Consulting Services for Organizational Development

Dear Karen Gregory:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Department of Administrative and Financial Services, Office of Information Technology, for RFP# 201902021 - Consulting Services for Organizational Development. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Fred Brittain
Chief Information Officer
Office of Information Technology
State of Maine

STATEMENT OF APPEAL RIGHTS

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Brimstone Consulting Group
DATE: 3/13/19, 5/6/19, 6/5/19

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Administrative and Financial Services
NAME OF FACILITATOR: Chad Lewis
NAMES OF EVALUATORS: Jim Lopatosky, Cassandra Perkins, and Heidi Orlando

SUMMARY PAGE

		<u>Points Awarded:</u>
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 50 Points)	45
Section II. Proposed Services	(Max: 25 Points)	24
Section III: Cost Proposal	(Max: 25 Points)	1.3
TOTAL POINTS	(Max: 100 Points)	70.3

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Brimstone Consulting Group
DATE: 3/13/19, 5/6/19, 6/5/19

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25 Score: 1.3

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
55,900	÷	1,042,625	x	25 points	=	1.3

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Consulting for Business Success
DATE: 3/6/2019, 5/6/19, 6/5/19

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DEPARTMENT NAME: Administrative and Financial Services
NAME OF FACILITATOR: Chad Lewis
NAMES OF EVALUATORS: Jim Lopatosky, Cassandra Perkins, and Heidi Orlando

SUMMARY PAGE

		<u>Points Awarded:</u>
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 50 Points)	27
Section II. Proposed Services	(Max: 25 Points)	13
Section III: Cost Proposal	(Max: 25 Points)	13.2
TOTAL POINTS	(Max: 100 Points)	53.2

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Consulting for Business Success
DATE: 3/6/2019, 5/6/19, 6/5/19

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25 Score: 13.2

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
55,900	÷	106,250	x	25 points	=	13.2

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: DME Consulting International
DATE: 3/7/2019, 5/6/19, 6/5/19

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Administrative and Financial Services
NAME OF FACILITATOR: Chad Lewis
NAMES OF EVALUATORS: Jim Lopatosky, Cassandra Perkins, and Heidi Orlando

SUMMARY PAGE

Proposal rejected due to non-response to request for additional/clarifying cost information issued on May 29, 2019

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: HRSS Consulting Group
DATE: 3/13/19, 5/6/19, 6/5/19

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Administrative and Financial Services
NAME OF FACILITATOR: Chad Lewis
NAMES OF EVALUATORS: Jim Lopatosky, Cassandra Perkins, and Heidi Orlando

SUMMARY PAGE

Proposal rejected due to non-response to request for additional/clarifying cost information issued on May 29, 2019

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Lumin Advantage Consulting Company
DATE: 3/6/2019, 5/6/19, 6/5/19

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Administrative and Financial Services
NAME OF FACILITATOR: Chad Lewis
NAMES OF EVALUATORS: Jim Lopatosky, Cassandra Perkins, and Heidi Orlando

SUMMARY PAGE

Proposal rejected due to non-response to request for additional/clarifying cost information issued on May 29, 2019

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Lean East
DATE: 3/7/2019, 5/6/19, 6/5/19

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25 Score: 25

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
55,900	÷	55,900	x	25 points	=	25

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Moretti Consulting, LLC
DATE: 3/20/2019, 5/6/19, 6/5/19

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DEPARTMENT NAME: Administrative and Financial Services
NAME OF FACILITATOR: Chad Lewis
NAMES OF EVALUATORS: Jim Lopatosky, Cassandra Perkins, and Heidi Orlando

SUMMARY PAGE

		<u>Points Awarded:</u>
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 50 Points)	34
Section II. Proposed Services	(Max: 25 Points)	20
Section III: Cost Proposal	(Max: 25 Points)	11.1
TOTAL POINTS	(Max: 100 Points)	65.1

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: Moretti Consulting, LLC
DATE: 3/20/2019, 5/6/19, 6/5/19

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25 Score: 11.1

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
55,900	÷	125,800	x	25 points	=	11.1

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: The Wathen Group
DATE: 3/12/19, 5/6/19, 6/5/19

Instructions: *The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Division of Procurement Services as part of your contract award selection documents.*

DEPARTMENT NAME: Administrative and Financial Services
NAME OF FACILITATOR: Chad Lewis
NAMES OF EVALUATORS: Jim Lopatosky, Cassandra Perkins, and Heidi Orlando

SUMMARY PAGE

		<u>Points Awarded:</u>
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 50 Points)	40
Section II. Proposed Services	(Max: 25 Points)	22
Section III: Cost Proposal	(Max: 25 Points)	5.2
TOTAL POINTS	(Max: 100 Points)	67.2

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER: The Wathen Group
DATE: 3/12/19, 5/6/19, 6/5/19

**EVALUATION OF SECTION III
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 25 Score: 5.2

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
55,900	÷	271,408.95	x	25 points	=	5.2

Evaluation Team Comments:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021

RFP TITLE: Consulting Services for Organizational Development

BIDDER NAME:

DATE: (Insert date proposal was reviewed by individual evaluator)

EVALUATOR NAME: Cassandra Perkins

EVALUATOR DEPARTMENT: Brimstone Consulting Group, LLC

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

Individual Evaluator Comments:

Organizational Experience and Qualifications:
3 Core Capabilities
Leading and Managing Change
Process Consulting
Coaching and Developing Leaders
1 – Univ of Maine IT, Dick Thompson, past client. Consult with Dick to get feedback?
2 Subcontractors listed; Charles Pfeffer & Jeremy Seligman
Org Chart – yes – proposed team of 6
Litigation – none
Cert of Ins – Valid, up to date
Proposed Services:
Integrated, multi-tiered approach
Agile principle methods and tools
Works w/CIO, Sr. Leadership Team
Sr. Team Alignment Process
Strategic Business Framework
Performance Leadership Process
Foundational Services
Executive Coaching and Stakeholder Management
Change Leadership Consulting
Change Management Consulting
Transfer of Learning
Timeline: March 2019 – June 2020
3 Phased Approach

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021

RFP TITLE: Consulting Services for Organizational Development

BIDDER NAME:

DATE: (Insert date proposal was reviewed by individual evaluator)

EVALUATOR NAME: Cassandra Perkins

EVALUATOR DEPARTMENT: The Wathen Group

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

Individual Evaluator Comments:

Organization Experience & Qualifications:
Both Public and private sector experience; provided roadmap and dates of proposed work
Proactive employee engagement
LEAN process is used; twice yearly revisits to see how initiatives are being met (references/reflects Agile principles)
Create robust employee engagement program
Pg 8; Dr. John Kotter's Eight Step for Effective Change is the model used for strategic change mgmt.
Pg 9; McKinsey's 7-S Framework
Staffing: Proposed staff of 5 appears to have vast experience; add'l staff available if needs are determined through survey results; No subcontractors; Org chart provided
Litigation; n/a; Cert of Ins provided/valid
Proposed Services:
Kotter's Eight Steps
Coaching, change strategy
Work Plan – initial – 3/19-6/20; timeline well laid out
Determine Existing Customer Metrics
Interview w/Employees and customers
Consolidate Report and Recommendations
Present Findings to Leadership Team
Inaugural Steering Ctte Mtg
Action Plan Workshop
Confirm Action Plans and Approval
Support and Progress Reporting
Close Out Forms
Wrap Up Workshop

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021
 RFP TITLE: Consulting Services for Organizational Development
 BIDDER NAME: Consulting for Business Success
 DATE: March 5, 2019
 EVALUATOR NAME: Heidi Orlando
 EVALUATOR DEPARTMENT: DAFS

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

Individual Evaluator Comments:

One of the first statements outlines the exact issue - culture is a CIO's biggest barrier to digital transformation. The remainder of the first paragraph is partially true, I'm not sure you can say this across the board when there are pockets of groups doing things well, yet these were not mentioned.
" Customer centric " isn't easy to understand is so true. Good to see the level of detail they go into defining what it takes to move from a reactive culture to one that focuses on the customer. I would also like to see a level of prioritization here also
Lewin's approach to change , particularly the 3-Step model, has attracted major criticisms. The key ones are that his work: assumed organizations operate in a stable state; was only suitable for small-scale change projects; ignored organizational power and politics; and was top-down and management-driven.
Unfreeze, Change and Refreeze – doesn't really consider that the organization needs to continue to learn. You can change process yet these should adapt as the business needs change or the technology around us changes.
Strategic Organization Development work flows along four trajectories that help answer the four critical questions for success: (these came from me) 1. What is the strategy of the enterprise we are leading? <i>What does the customer need?</i> 2. What organizational structure best meets the needs of the strategy? <i>How do we meet these needs - future of IT?</i> 3. What work and enterprise processes must change / be developed to support the structure and strategy? <i>What do we have in place currently?</i> 4. Who are the people who must fill the seats to improve the flows and structure to achieve the strategy? <i>Gap between 2 and 3 – what will it take to fill this gap?</i>
There is a fair amount of training referenced yet I'm finding it challenging to see how the work flow process is changed. Review with the CIO would review progress , adjust initiative scope and / or cadence, guide, advise, or suggest new and different approaches to efforts will keep the work in line with the strategy
Skilled Management Team – This work feels very productive in teaching and coaching managers to hold staff accountable, communicate for clarity, hone skills to become more customer centric
Engaged Staff – good verbiage around why they should be engaged and that being engaged will make them happier yet none of the team building and relationship building that would come with doing Scrum or Kanban. No mention of Agile here. Seems to be a lack of experience.
An Employee Life Cycle (ELC) strategy will be developed to reinforce and sustain the cultural shift. This paragraph feels like fluff yet I think is saying we'll need to have the right people on the bus with the right tokens (skillsets).

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021
 RFP TITLE: Consulting Services for Organizational Development
 BIDDER NAME: DME Consulting International
 DATE: March 3 & 5, 2019
 EVALUATOR NAME: Heidi Orlando
 EVALUATOR DEPARTMENT: DAFS

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

Individual Evaluator Comments:

Like the layout of the response
Have worked in government and the armed forces also university
P – right out of the gate they are referencing key training programs that made the difference included workshops for leaders and employees in the following areas: <ul style="list-style-type: none"> • Communication • Team Building • Conflict Resolution • Coaching and Feedback We feel that this experience offers a valuable best practice in IT transformation that we can leverage for your needs.
P - The tool TetraMap is based on teams. Helping you create better teams, naturally. Humans change things. Occasionally for the worse, but more often for the better. Teams, organizations, projects, communities and families - we're all part of teams. The biggest challenges in organizations today are connecting our diverse people and unravelling complex interconnected problems. Our core belief: Everything we do is centered around one core belief: strength lies in valuing differences.
P- Like the change Delivery and the mention of Strategic HR Mgmt
P – Facilitated Learning approach seems very solid, like the outline of the learning program
P – interesting how they include HR and expert Executives in the learning and training so they can carry this on with new employees
N- I'm not a fan of the 360-degree review. Those have not been found to be very accurate. People inflect personal feelings more when they are privately filling these out. It's much better to just work as a team and be honest and open in person.
P - agile-based transformation strategy
N – there is a substantial amount of virtual training, I am a fan of virtual but not sure it can all be done in this manner. The trainer will need to see and read the room to best understand how to adapt to ensure everyone is getting the most from the sessions.
Story telling aligns well with problem solving as a group, helps everyone understand the impact of communication and provides a good understanding of how differently people process information.
Team of three, like how they provide an overview of each person's credentials.
P- an assessment based approach provides a solid start at the right level.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021
 RFP TITLE: Consulting Services for Organizational Development
 BIDDER NAME: Lumin Advantage Consulting Company
 DATE: March 4, 2019
 EVALUATOR NAME: Heidi Orlando
 EVALUATOR DEPARTMENT: DAFS

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

Individual Evaluator Comments:

Date March 4, 2019 LUMIN Advantage Consulting Company
Interesting this company is a woman owned small business
They specialize in working with STEM based, technical organizations
In business for last 9 years,
Project 1 – Local Government Marathon County
Continuously enhance its culture by strengthening many cultural components - including employee performance in customer service focus
1100 people over 6 years
Project 2 - Armed Forces
US Army Corps of Engineers is a civilian-based/military-led federal agency
3500 employees, working with them over the last 11 years.
People relation skills, leadership development training
360 degree assessment survey
Customer focused, communication, accountability and customer service
Project 3 – Sacramento Engineer District – Armed Forces across 5 states
Focus annually on a 9-month long Leadership Development Programs (“LDPs”) for emerging leaders, team leaders, and supervisors
Training of interpersonal behaviors and interactions, self-awareness and self-management, situational leadership and servant leadership style, working with teammates and others
Insurance capped at \$1MM
Three key areas to be addressed and they focused more on the top two.
Proposed Organization Change Strategy -
Updating Organization Change Strategy
Leadership & Coaching
Advisory to the CIO
The approach provides details on how to access,

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER NAME: Lean East
DATE: March 5 & 6, 2019
EVALUATOR NAME: Heidi Orlando
EVALUATOR DEPARTMENT: DAFS

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

Individual Evaluator Comments:

Strong overview of the company's organizational overview and mission
The Triangle has been a fundamental principle in ITIL – Back to basics (People, Process and Technology)
Many of their leaders are senior and from a waterfall project management methodology
Customer focus, bring out the best in people, has completed government work
2 consultants – they each have their own business (self-employed) risk only one deep
P – discovery stage determines the approach
I – Build a competency map for these behaviors (groundwork for future talent acquisition, talent development and succession planning—retention practices). i. Individual Contributor/Associate/employee ii. Supervisor/Manager iii. Leader
P - cross functional teams to ensure buy-in and identify how to integrate into current practices and processes
P – lots of coaching and mentoring along with Training They take an approach to develop and retain talent
I – implementation timeline – has no overlap, when working with people implementation seems like a strange word and such an exact timeline seems unrealistic.
I – learning value stream mapping and lean principles are positive.
N – these principles would be best implemented if it were tied together with Scrum or Kanban.
A3 Methodology, value stream Mapping, improvement process with the 4 steps what, how, current, gap
PDCA (plan–do–check–act or plan–do–check–adjust) is an iterative four-step management method used in business for the control and continuous improvement of processes and products. It is also known as the Deming circle/cycle/wheel, the Shewhart cycle, the control circle/cycle, or plan–do–study–act (PDSA).
Timeline seems very linear, seems it should be done in parallel or in overlapping series

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021
 RFP TITLE: Consulting Services for Organizational Development
 BIDDER NAME: Consulting for Business Success
 DATE: 5-March-2019
 EVALUATOR NAME: Jim Lopatosky
 EVALUATOR DEPARTMENT: DHHS

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

Individual Evaluator Comments:

N – could not pick out what the organization is – reads like it's a one-person show that worked on different projects.
N - Could not tell what was personal experience vs what was part of the company's experience
I – through further reading, determined this was a two-person team
P – did highlight leads' experience, as required
I – didn't specifically state there were contractors or not, but through further reading it became clear that there were no subcontractors
P – Overview showed CBS has worked with organizational leaders over the past years
P – Listed three projects. 1) worked with leadership of technology organization to restructure and establish leadership program, 2) worked with analytics company as consultant to CEO to establish management program and help set strategic abilities, 3) worked with frozen food distribution company to rebuild a leadership team, redefine success, and establish a leadership program
I – Org chart provided, only two resources.
N – not a lot of depth. There only two resources and no subcontractors. Could be delays if they have to bring in subject matter experts. Risk is that they do not have all the knowledge and expertise required to perform the job.
P – No litigations, current and valid COI included.
P – recently performed work with OIT – the listening sessions for the beginning stages of this project
N – Did not tie proposal to the three goals outlined in RFP: preferred IT provider for State, being top IT employer in State, and developing IT staff to be experts in their field
P – recognized and will continue core behaviors: get to yes, be one team, and lead for results
P – outlined methodology – unfreeze, change, freeze – the latter of which is in years two and three of the project
P – will use agile/iterative approach with project
I – read like the two-person team will be immersed in OIT with authority to ensure there is strategic alignment with each OIT director
P – proposal seemed to address rebuilding leadership team
P – proposal seemed to address ensuring employee skill/competency development
N – proposal did not address employees being recognized as experts in their field
N – the proposal sections did not align with what was asked for in the RFP, suggests bidder may not comply with OIT's requests
N – It was hard to determine if all four key areas were addressed. execution of organization change strategies, leadership coaching and advisory services seemed to be covered, but updating the change strategy seemed missing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021

RFP TITLE: Consulting Services for Organizational Development

BIDDER NAME: Consulting for Business Success

DATE: 5-March-2019

EVALUATOR NAME: Jim Lopatosky

EVALUATOR DEPARTMENT: DHHS

P – did include ways to measure success –survey based for customer satisfaction; grievances document (unsure what this is); and employee performance review information for adherence to key behaviors

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER NAME: DME Consulting International
DATE: 5-March-2019
EVALUATOR NAME: Jim Lopatosky
EVALUATOR DEPARTMENT: DHHS

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

Individual Evaluator Comments:

P – provided organizational overview, mission is supportive of OIT's goals – to improve the organization and its processes
N – spelling errors in opening paragraph. Assume that it meant its goal is to “simplify” processes and learning required for organizations. Read as “simply”.
P – provided examples of key components that will be part of project: “be one team” behaviors, “lead for results” behaviors, facilitated learning, coaching, creating positive work environments, HR expertise, IT talent management, and culture exchange
I – key resource on this project has experience in helping rebuild another IT org. Ended up releasing 350 out of 1600 people, and outsourcing to an offshore company to meet goals
P – gave three examples of projects, two of which were under an NDA: 1) Pepsico -collaboration between multiple sites; 2) NDA 1 - Project is ongoing, to implement a culture of continuous improvement which included implementing KPIs; 3) NDA 2 – IT merger of two large IT functions in major bank;
N – labeled as Project Four with Cooperative Bank, was actually a letter of reference for project lead that would be assigned to Maine – poor quality controls
I – no subcontractors are anticipated
P – project org chart included – 3 people 1) director/coach, and 2/3) sr consultants
P – No litigations, current and valid COI included.
P – proposal attempts to align with requirements of RFP, it included references to RFP requirements
P – bidder did research on OIT's organization and included leadership positions as part of proposal
P – outlined method for initial project establishment, and fact finding
N – several typos in proposal. Aside from those already mentioned, “stakehodler4s” on page 9.
N – not sure how coaching (page 8) plays a role. There are interviews, but it looks like an online learning tool is used
I – initial project takes roughly 8 weeks, then ongoing coaching/support as needed.
P – outlined methodology/plan
P – Included ways to measure success – quarterly/frequent pulse surveys, KPIs (established by project team)
P – referenced that the approach must be agile/flexible
P – proposal seemed to address rebuilding leadership team
N – proposal did not address ensuring employee skill/competency development
N – proposal did not address employees being recognized as experts in their field

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development
BIDDER NAME:
DATE: 11-March-2019
EVALUATOR NAME: Jim Lopatosky
EVALUATOR DEPARTMENT: The Wathen Group

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

Individual Evaluator Comments:

N – The proposal included too much extraneous information (such as quotes from others, telling the State about its own project) that took away from the message. Short and concise did not apply.
P – proposal hit key notes – meaningful relationships, employee engagement, customer centric culture, learning culture, governance, and workforce strategy
I – very little about the organization, other than DBE in Maine. Recently opened office in Yarmouth, part of the chamber of commerce
P – outlined change framework – Dr John Kotter's "Eight Steps for Effective Change"
P – uses own change management framework, based off of McKinsey's 7-S framework for diagnostic modelling of organization
I – No subcontractors, although where SME's needed, will work with OIT – does this mean they will obtain or this will be an additional cost for OIT?
P – project team includes 3 person management team, five people who will be on the ground with the project (two of which are part of the management team), and a nine person team of additional associates
P – none disclosed
P – liability insurance current and valid
I – two of candidates experience read as though it was theirs' at previous jobs as opposed to TWG experience
P – listed three projects – 1) USM – attracting and retaining technical labor force, 2) Cubic Transportation Systems – advisory services for new fare payment system, 3) LA Metro Trans Authority – operational effectiveness audit, implementation of recommendations
I – Duplicated information from overview. Risk that provider may overdo the paperwork, which should support the project
P – includes discovery phase with steering committee (CIO chair). Discovery phase will be a review with the ability to enhance work to date
P – appreciated that approach aligned well with Kotter's 8 step methodology. TWG stated that OIT performed the first step by creating a sense of urgency. However, I would have expected TWG to validate
P – integrated goals to methodology
P – big on interviewing key stakeholders
I – implements 10 action plan teams
I – project lasts 15 months with action teams doing the bulk of the work over a one year period
I – four key areas of RFP answered throughout the proposal



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES
BURTON M. CROSS BUILDING, 3RD FLOOR
78 STATE HOUSE STATION
AUGUSTA, MAINE 04333-0078

SERVING THE PUBLIC AND DELIVERING ESSENTIAL SERVICES TO STATE GOVERNMENT

JANET T. MILLS
GOVERNOR

KIRSTEN LC FIGUEROA
COMMISSIONER

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development

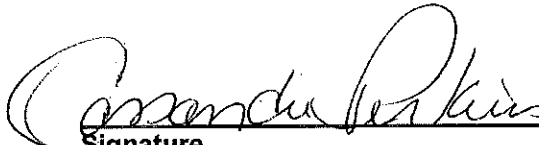
I, Cassandra Perkins, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Administrative and Financial Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have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

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

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

I understand that the evaluation process is to be conducted in an impartial manner. 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 funding decision notices for public distribution.



Signature

3/1/19

Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES
BURTON M. CROSS BUILDING, 3RD FLOOR
78 STATE HOUSE STATION
AUGUSTA, MAINE 04333-0078

SERVING THE PUBLIC AND DELIVERING ESSENTIAL SERVICES TO STATE GOVERNMENT

JANET T. MILLS
GOVERNOR

KIRSTEN LC FIGUEROA
COMMISSIONER

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development

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

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

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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 funding decision notices for public distribution.

Heidi Orlando
Signature

2/28/2019
Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES
BURTON M. CROSS BUILDING, 3RD FLOOR
78 STATE HOUSE STATION
AUGUSTA, MAINE 04333-0078

SERVING THE PUBLIC AND DELIVERING ESSENTIAL SERVICES TO STATE GOVERNMENT

JANET T. MILLS
GOVERNOR

KIRSTEN LC FIGUEROA
COMMISSIONER

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 201902021

RFP TITLE: Consulting Services for Organizational Development

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

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

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

I understand that the evaluation process is to be conducted in an impartial manner. 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 funding decision notices for public distribution.

Signature

Date

28 - Feb - 19



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE & FINANCIAL SERVICES
BURTON M. CROSS BUILDING, 3RD FLOOR
78 STATE HOUSE STATION
AUGUSTA, MAINE 04333-0078

SERVING THE PUBLIC AND DELIVERING ESSENTIAL SERVICES TO STATE GOVERNMENT

JANET T. MILLS
GOVERNOR

KIRSTEN LC FIGUEROA
COMMISSIONER

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 201902021
RFP TITLE: Consulting Services for Organizational Development

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

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 that the evaluation process is to be conducted in an impartial manner. 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.

April 22, 2019

Signature

Date