State of Maine <u>RFP / Proposal Master Score Sheet</u>

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 FO	R RFP# 2	2019020	21: <u>Consultin</u>	g Serv	ices for Orga	nizatior	al Developme	<u>nt</u>		
PROPOSAL SUBMITTED BY:		BCG			CBS		DME-CI	HRSS-CG		
	COST:	Cost:	\$1,042,625	Cost:	\$106,250				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 SUBM	TTED BY:	LACC		LE			MC		WG	
	COST:			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		ed – See Team sensus Notes	4			20		22	
Section III: Cost Proposal	25			25			11.1		5.2	
TOTAL	100				<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

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.

the

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



Janet T. Mills Governor STATE OF MAINE Department Of Administrative And Financial Services Office of Information Technology

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

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



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

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



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: 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



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



Janet T. Mills Governor STATE OF MAINE Department of Administrative and Financial Services Office of Information Technology

> 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:

• Brimstone Consulting Group LLC

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.

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



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



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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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.

the

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

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

		Points Awarded:
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
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TOTAL POINTS	(Max: 100 Points)	70.3

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 I Organization Qualifications and Experience

Total Points Available: 50 Score: 45

Overview of Organization Founded in 2001 Mission appears to align with RFP – organization change and leadership development Most experience with private sector/worked with Maine University System Experience with technology companies and transformations Listed four projects that align with OIT/RFP goals From provided project: Shifting role of IT from order taker to business partner and from command and control to engaging and inspiring Three core capabilities include leading and managing change, process consulting and coaching and developing leaders Subcontractors
Mission appears to align with RFP – organization change and leadership development Most experience with private sector/worked with Maine University System Experience with technology companies and transformations Listed four projects that align with OIT/RFP goals From provided project: Shifting role of IT from order taker to business partner and from command and control to engaging and inspiring Three core capabilities include leading and managing change, process consulting and coaching and developing leaders Subcontractors
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and control to engaging and inspiring Three core capabilities include leading and managing change, process consulting and coaching and developing leaders Subcontractors
and developing leaders Subcontractors
Two subcontractors identified are also partners
Organizational Chart
Org chart provided
Six staff/resources identified for project
Other company resources readily available
Litigation
No disclosed litigation
Certificate of Insurance
Valid and current

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 II Proposed Services

Total Points Available: 25

<u>Score</u>: 24

1.	Services to be Provided
-	Solutions can be tailored to incorporate Agile principals, methods and tools
-	Leverage existing activities/initiatives
-	Leadership and organizational alignment with developed strategies
-	Their approach includes leadership development and change management
-	Sustaining with transfer of learning
-	Effort well organized, focused on getting job done. Includes check points for accelerating timeline where possible
-	Discovery phase includes information from interviews and data
-	Approach applied hands-on learning of culture change to enable sustainability
2.	Implementation – Work Plan
-	16-month work plan
-	Iterative approach yet phased
-	Recognized that key elements start day one: coaching, leadership consulting, change
-	
-	Recognized that key elements start day one: coaching, leadership consulting, change
-	Recognized that key elements start day one: coaching, leadership consulting, change
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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

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER: Consulting for Business Success 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

		Points Awarded:
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
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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 I Organization Qualifications and Experience

Total Points Available: 50 Score: 27

1.	Overview of Organization
-	Limited to no organizational description
-	Work referenced in qualifications section is a mix of personal (lead's) and Bidder projects
-	Highlighted lead's experience
-	Without Bidder's mission statement, difficult to determine alignment with goals of RFP
-	None of three projects provided were government related
-	Three projects focused on rebuilding leadership teams and establishing leadership programs,
	align with two of the goals
-	Works with senior leadership
-	Prior work helped OIT lay the groundwork for this project
2.	
-	None (inferred)
3.	
-	Requires OIT resources to provide administrative services to contractor
-	With limited resources identified, risk for project delays if SMEs needed
4.	Litigation
-	None disclosed
5.	Certificate of Insurance
-	Valid and current

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 II Proposed Services

Total Points Available: 25

<u>Score</u>: 13

1.	Services to be Provided
-	Acknowledges customer centric
-	Provides basic change management methodology that typically is top-down
-	Methodology Lewin's approach to change 3 step model: unfreeze/change/refreeze
-	Strategic Organization Development asks appropriate questions
-	Information to inform decisions is subjective, based upon conversations in listening sessions or like.
-	Includes customer input as part of information gathering
-	There does not appear to be relevant and OIT-wide data to support information other than feedback/input and client tech footprint tickets
-	Proposal focuses on cultural change and leadership development with minimal reference on developing staff to be SMEs
2.	Implementation – Work Plan
-	Concurrent projects and majority of work in first year
_	Hands on and defining change in first year and to-be determined role in out years based upon
	vear one
-	Low number of proposed hours in workplan showed bidder had a lack of understanding of what was being asked for in the RFP
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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

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

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

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
RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER: Lean East 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

		Points Awarded:
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 50 Points)	25
Section II. Proposed Services	(Max: 25 Points)	4
	(11	
Section III: Cost Proposal	(Max: 25 Points)	25
TOTAL POINTS	(Max: 100 Points)	54
	(IVIAN. 100 F 01113)	54

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 I Organization Qualifications and Experience

Total Points Available: 50 Score: 25

1.	Overview of Organization
-	Clearly stated Bidder's mission and organizational overview
-	Mission did not align well with RFP – process improvement focused vs cultural change
-	People, process and performance driven with focus on reducing risk and cost
-	Experience with company - LEAN
-	DHHS cancelled contract due to performance issues. Bidder has other contracts with State that
	have not been cancelled
-	Two of three projects with State government, first of which aligns with services in RFP
2.	Subcontractors
-	Listed two subcontractors
3.	Organizational Chart
-	Resources for project appear reasonable
-	Proposed team of three with no additional placeholders
4.	Litigation
-	No past or present litigation
5.	Certificate of Insurance
-	Valid and current

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 II Proposed Services

Total Points Available: 25

<u>Score</u>: 4

1.	Services to be Provided
-	Process appears very linear and lacks the requested iterative approach
-	Approach is top-down working with CIO then down leadership chain
-	Team of three with one person focused on OD effort may not be sufficient to support goals of RFP in a timely manner
-	Committed to working with senior and upper level management
-	Proposal focuses on leadership development with minimal reference on developing staff to be SMEs
-	Proposed option for OIT to procure additional services of LEAN process improvement
-	Proposal does not provide substance supporting that their approach to organizational change will be successful
2.	Implementation – Work Plan
-	Work plan step-by-step
-	Plan focuses heavily on leadership development but not holistically on the culture of organization
-	Low number of proposed hours in workplan showed bidder had a lack of understanding of what was being asked for in the RFP

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

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

		Points Awarded:
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

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 I Organization Qualifications and Experience

Total Points Available: 50 Score: 34

1.	Overview of Organization
-	Proposal showed alignment with Bidder experience and needs of this RFP
-	Hard to determine the mission in the company overview
-	Combined experience of senior level leaders appears to be sufficient, however hard to determine
	which was individual and which was Moretti Consulting experience.
-	Three projects: demonstrated work that would coincide with services in RFP, especially the first
	with reorganizing an IT department.
-	New York Power Authority project is a quasi-state agency
-	Overall proposal was very disorganized and did not follow format, which made it very challenging
	to pick out key information.
-	One project addressed resistance to change with a "Coached Up or Out"
	Subcontractors
-	None specified
3	Organizational Chart
-	Several nationally recognized OD certifications
-	Provided Org Chart; seemed appropriate – listed 6 resources
-	Pending Women Owned business certification status
4	Litigation
	Litigation statement missing
5.	Certificate of Insurance
-	Provided – valid and current

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 II Proposed Services

Total Points Available: 25

<u>Score</u>: 20

1.	Services to be Provided
	- Proposal outlined their own standard methodology for organizational change that addressed
	key areas requested in the RFP.
	- Focused on leadership training and development as the primary drivers for culture change
	 Committed to working with management on senior and division levels
	 Tools of choice are 360/180-degree surveys and their curriculum
	 They mention "Customer / Person – Centered" vs "Customer-Centric" which focuses on the personal experience of the customer.
	- Seemed to understand the current challenges OIT is facing
	- Did not seem to have a plan for tackling problem areas of the organization, rather focused
	primarily on leadership development.
	 Plan includes quality service and change management training to employees.
	- Know change is disruptive
	- Included additional trainings as options
	Implementation Work Dian
Z .	 Implementation – Work Plan First 10 weeks are planning, assessment, and design, the following year is training and
	organizational development interventions – total of 15 months
	Monitor and revise organization change strategy as needed

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

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

	Points Awarded:
(Max: 50 Points)	40
(Max: 25 Points)	22
(Max: 25 Points)	5.2
(Max: 100 Points)	67.2
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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 I Organization Qualifications and Experience Total Points Available: 50 Score: 40 ****** **Evaluation Team Comments:** 1. Overview of Organization Public and private sector work -- Common methodologies – modified McKinsey's framework - change models Mission appears to align with services requested in RFP -Proposal did not follow organization stated in RFP and included a lot of non-relevant information Project descriptions lacked details to determine relevance to the RFP requirements -- Risk may get more consultation than desired (LA Metro) 2. Subcontractors None listed -3. Organizational Chart Proposed staff of five with nine additional SMEs Resources appear to have appropriate experiences 4. Litigation None listed 5. Certificate of Insurance Valid and current -

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 II Proposed Services

Total Points Available: 25

Score: 22

1.	Services to be Provided
-	Noted important for OIT to commit time to culture change
-	Integrated Kotter's 8 steps for effective change into work plan
-	Solid discovery phase – assessing what is available for data
-	Interviewing key stakeholders
-	CIO part of the steering committee
-	Training is focused on promoting growth, flexible mindsets and people improvement
-	Integrated key behaviors
-	References to coaching on multiple levels
-	Talk about developing SMEs regarding organizational development
-	Action teams need to be eased in and structured to OIT's capacity as opposed to several action
	teams at one time
-	Proposed services aligned with the goals of the RFP
-	Approach for each action team supports determining priorities, measuring results, alter/change
	plan as needed
-	Approach would take into consideration any new processes to increase employee buy-in
2.	Implementation – Work Plan
Ζ.	Timeline well laid out – understandable, March '19 to June '20
-	10 action teams run concurrently – likely not be feasible, extend timeline if needed
-	To action teams fun concurrently – likely not be reasible, extend timeline if needed
L	

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	I	5.2

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
I – 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

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: Consulting for Business Success DATE: (Insert date proposal was reviewed by individual evaluator) EVALUATOR NAME: Cassandra Perkins 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	Marin based
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RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DME Consulting International – Currian DATE: (Insert date proposal was reviewed by individual evaluator) EVALUATOR NAME: Cassandra Perkins EVALUATOR DEPARTMENT: DAFS

Instructions: The purpose of this form is to record proposal review notes written by <u>individual</u> evaluators for this Request for Proposals (RFP) process. It is <u>required</u> 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: Mulfi Withund

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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: HRSS 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.

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Individual Evaluator Comments:

Organizational Experience and Qualifications:

100% STEM Industry related

360 degree assessment, competency based coaching, Six (6) Step Process

12 Month Program Duration

ADDIE Instructional Design Model – (Analysis, Design, Development, Implementation & Evaluation)

Org Chart – yes – staff of 5 proposed

Subcontractor: CatMedia (CatVideo) - support of OPM

*No subs plan to be used for this contract

Cert of Ins - current and valid; q add'l cert for Canaveral Port Authority?

No Litigation History

Proposed Services: March 2019 – July 2020

5 Stages

OCA - Organizational Culture Assessment

360 Degree Assessment

Micro Earning Solutions

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: Lumin Advantage Consulting Company DATE: (Insert date proposal was reviewed by individual evaluator) EVALUATOR NAME: Cassandra Perkins 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: Minnelsuta based

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RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: Lean East DATE: (Insert date proposal was reviewed by individual evaluator) EVALUATOR NAME: Cassandra Perkins 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: Ware based

previously worked a DHHS
Currently mirling w/DMR + DEP is on deck
- Crood feedback from Dittes 10MS on organy use of Concepts - Success posed on Will day.
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30 m OD Experience (michille)
- layon a (stave)
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- peuple + process poused for improvement

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DATE: March 19, 2019 EVALUATOR NAME: Cassandra Perkins EVALUATOR DEPARTMENT: Moretti Consulting, 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:

Overview -

Proposal doesn't follow layout specified in RFP – numerous typos throughout Pg 4 Key drivers, strategic value & critical success factors identified thru generative thinking process Pg 5 6 Step Customer Centric, High Performance Org Change Strategy

Sub Contractors – none mentioned

Org Chart - provided - team of 6 with add'l consulting available - woman owned pending

Team size appears reasonable based on work outlined

Experience appears to be outside of Moretti Consulting work

Litigation - Not addressed or mentioned in proposal

Certificate of Insurance – provided and valid

Services Provided – Pg 6 Training Executives/CIO 2 hrs.; Sr. Mgm't 2 day training; Two 2 hr. sessions/3 mos.; Employees/Contractors 2 hr. session required; Optional Team Bldg and Living w/change

180-360 degree survey used

Work Plan: 15 month plan (3/19 - 6/20)

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'I 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

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DATE: March 20, 2019 EVALUATOR NAME: Heidi Orlando 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:

Founded 2001
Approach 3 sources outward bound, small overview of the company/organization
4 projects align with RFP requirements
2 Subcontractors as needed
Org chart – Ig staff
Litigation – none
Insurance
Change accelerated – the better you are at change the better you are at business. This is a good fit for every IT organization.
Coaching & Developing Leaders instead of just teaching. They partner to deepen ability to engage, observe and direct their teams.
Shifting the role of IT from an "order taker" to a business partner – from tactical to strategic while modernizing all technologies
They mention the proposed solution can be tailored to incorporate Agile as it teaks on a different form in every company.
Propose building a change map – gather info current state, assess vision for the future, state of readiness, enablers and potential pitfalls. Nice comprehensive approach
Like that they suggest cross-functional project teams, of the best and brightest leaders

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? What does the customer need?

2. What organizational structure best meets the needs of the strategy? How do we meet these needs - future of IT?

3. What work and enterprise processes must change / be developed to support the structure and strategy? What do we have in place currently?

4. Who are the people who must fill the seats to improve the flows and structure to achieve the strategy? Gap between 2 and 3 – what will it take to fill this gap?

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).

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

Satisfied Customers – Customers are satisfied when they get – No mention of customers being part of the Intake Process, to prioritize and be at the table when discussing Opportunities, Projects, tasks in a Scrum etc.

 Scrum etc.

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: 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.

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DATE: March 10, 2019 EVALUATOR NAME: Heidi Orlando EVALUATOR DEPARTMENT: HRSS 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:

Learning methodologies feel weak for OD and change
Projects align with RFP
Heavy on 360-degree feedback – not a fan it's based too heavily on others opinions not the individual
STEM – based focus
Org chart – outlines roles
No subcontractors or litigation
Lengthy proof of insurance – only needed one page
Feels like its written in legal lingo or legal ease
Several training coaching sessions feels more academic than hands on
Change should relate to getting better at IT Delivery
Active listening questions strategy good at all levels
Data analysis on people instead of discussing and viewing the progress

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,

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-employeed) 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

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DATE: March 12, 2019 EVALUATOR NAME: Heidi Orlando EVALUATOR DEPARTMENT: Moretti Consulting, 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:

Company overview was very short most of detail was about the people not direction of the company. Projects align with RFP

Nationally recognized certs – 1 resource has a PHD

Customer / Person - Centered (this is a step above Customer Centered

They address people who resist the culture change

Used our behaviors and vision, addressed succession planning, career paths, future operating models Asked good questions - noted our as is status

Established planning team should be key leaders and stakeholders

Noted change is disruptive and needs to be prioritized

Coaching, training, surveys check ins to access and prioritize regularly

Like focus – leadership culture, customer centric principles, assess dept processes for improvement & high performing skills, leading change to include EIQ

Few typos - the ones that are normally picked up by spell check (housr instead of hours)

No mention of Agile - it was in the RFP but not in the requirements

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DATE: March 10, 2019 EVALUATOR NAME: Heidi Orlando 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:

Sighting McKinsey insights – it's very current and relevant
Projects similar to RFP – provided extra information
Like the change models
Large staff to draw upon as needed
No subcontractors or litigation
Experience with state government
They understand employee engagement involves safety and trust
Moving from waterfall to Agile facilitates change and a learning culture
They not how commitment to the time for culture change work is key!
Solid discovery phase, iterative approach
Promote growth and mindset which instills flexibility, they continually focus on improving the process
Teach supporting determining priorities, measures, progressing change, developing SMES and
leadership
Approach of utilizing things you have in progress increases buy-in, adoption and acceptance of change
to be part of the solution. This would all be beneficial with Intake / Prioritizing the IT Portfolio
Timeline makes sense matches RFP
Seems like they come prepared with a short timeline yet a large team to keep things progressing.

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DATE: 12-March-2019 EVALUATOR NAME: Jim Lopatosky 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:

P – The mission of the organization seems to align with RFP proposal – primarily organizational change and leadership development

I – Maine based company, since 2001

P – company overview is concise and paints the picture that this group was worked with several large companies. No government entities, closest is University of Maine system

P – four projects identified, include: 1) UMaine – leadership development and org redesign; 2) Gen Dynamics, Electric Boat – org redesign and leadership development; 3) Express Scripts IT – IT team culture shifting and leadership redevelopment; 4) NY State Crime Analysis Centers – strategy update P – projects align well with OIT goals, especially 3

I – Subcontractors – really none. The two people identified look like Brimstone employees/partners P – company org chart provided, as well as OIT project team. The two leads for OIT project team were identified (under subcontractors) and have experience that aligns with OIT's needs

P – no known litigation

P – COI valid and current

I – discovery phase includes information from interviews and data

P – will leverage existing activities/initiatives

P - approach/plan well organized

I – overall timeline is 16 months

P – approach includes leadership development, change management

P – aligns leadership team, then organization

I – includes transfer of learning

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

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

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

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

 P – Works with only STEM organizations I – in business for 10 years (2009) P - focuses on organizational assessment, training, leadership development P – public and private clients P – listed three projects 1) Forest Service – leadership development (360 focused), 2) US Mint – leadership development, 3) KPC – assisted in developing courses I – included high level org chart of company I – will not use subcontractors P – no known litigation
 P – public and private clients P – listed three projects 1) Forest Service – leadership development (360 focused), 2) US Mint – leadership development, 3) KPC – assisted in developing courses I – included high level org chart of company I – will not use subcontractors P – no known litigation
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leadership development, 3) KPC – assisted in developing courses I – included high level org chart of company I – will not use subcontractors P – no known litigation
I – will not use subcontractors P – no known litigation
P – no known litigation
N – insurance is not standard Accord document. Rather, it is a copy of their policy.
I – includes list of labor categories that will likely be used on project
N – does not include any named resources
I – Project seems to utilize 360 assessments
I - proposal included detailed description of all the major steps and milestones
I – data gathering by interviews of 30 SMEs
N – approach does not seem iterative. Rather, develops recommendations and then implements them
in parallel over six month period, evaluating at end
I – project last 18 months

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: Lumin Advantage Consulting Company DATE: 6-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, works with "STEM" organizations (Science, Technology, Engineering, and Mathematics). That's because these companies have excellent technical skills but often lack in the people-related skills.

P – work is entirely in public sector

I – uses "nationally normed organizational culture surveys"

I – Mission is to work with these organizations, and develop cultures that bring teams closer to their missions, highlighting customer service

P – gave three examples of projects: 1) County of Marathon – worked with IT Department to improve culture. Ongoing since 2011, with reassessments every 2 years; 2) US Army Corp Engineers – strengthen people related skills, leadership/management development; 3) Sacramento Engineer District – leadership development programs

I – no subcontractors are used. If SMEs are required, they are hired as short term, regular employees P –org chart included – 6 people: 2 partners, 1 senior consultant, and 3 consultants

P – No litigations, current and valid COI included.

P - proposal outlined and provided detail on their methodology for organizational change

P – proposal acknowledged and tied to three key behaviors outlined in RFP (get to yes, be one team, lead for results). Also acknowledged work to date

P – proposal focuses on organizational change as the key action

P – proposal uses a standardized measuring tool – Denison Org Cult Survey – that measures wide range of items (12 key components). Requires regular assessments. Gave example of before/after in another project

P – commits to working closely with leadership and division levels

 $N-\mbox{did}$ not touch upon working with employers to be recognized as experts in their fields

N – proposal did not address ensuring employee skill/competency development

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: Lean East DATE: 6-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 to improve the organization through its people and processes, with performance measures

N - Heavy on process improvement/LEAN. Does not align with intent of RFP

I – working with DMR on org improvement project. Signing contract with DEP

P – gave three examples of projects: 1) DHHS/OMS – org transformation support, project training, learn process improvement; 2) Community Health Options – help implement Lean and Agile with team, help with some processes; 3) DHHS/OMS – Process Development/improvement

N – DHHS cancelled a contract with them for performance reasons. Contract was to assist with implementation of project management, working with "train the trainer". Also spent time trying to get "bigger" contract

I – the project team uses two independent subcontractors

P – project org chart included – 3 people 1) president, and 2) senior consultants

P – No litigations, current and valid COI included.

P – proposal acknowledged and tied to three key behaviors outlined in RFP (get to yes, be one team, lead for results)

I – proposal did not outline a methodology. Rather, it laid out a project plan to support change

N – proposal/plan was top down, lacked iterative/circular process to catch feedback/issues (other than once at the end of each phase)

N - Proposed using LEAN to improve OIT processes. This is not what the RFP is requesting

P – commits to working closely with leadership and division levels

N - did not touch upon working with employers to be recognized as experts in their fields

N - proposal did not address ensuring employee skill/competency development

RFP #: 201902021 RFP TITLE: Consulting Services for Organizational Development BIDDER NAME: DATE: 18-March-2019 EVALUATOR NAME: Jim Lopatosky EVALUATOR DEPARTMENT: Moretti Consulting, 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:

N – could not find statement about pending litigation

P – liability insurance current and valid

I – hard to determine mission of organization in company overview. They are "very experience in organizational change and development" – typo right off the bat. This was followed by a list of credentials to support their certifications

I – further information shows that the bidder has experience that aligns with the goal of RFP coaching, change management, org alignment, org development which includes government and IT - P – 3 projects: 1) HealthNow – leadership training and org change strategy to new IT team – similar to this RFP request; 2) Beechwood Continuing Care – change culture from org focused to cust focused in nationally recognized "Welcome Home" program; 3) NY Power Authority – exec coaching with 360

P – 6 person project org chart included, with detailed listing of their credentials and experience I – subs not specified

I - approach includes RFP high level goals and key behaviors

P – approach includes planning, assessment and design for first 10 weeks, then training and OD interventions for the following year

I - initial steps include agreement as to the priorities of other projects and this effort

I - includes establishing outcomes and measures

I – includes leadership training and coaching, using 180 or 360 surveys

I – quality service, change mgmt training to all employees

N – proposal was very disorganized, did not follow directions laid out in the RFP

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 disgualified 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.



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: <u>Consulting Services for Organizational Development</u>

I, <u>Heidi Orlando</u>, 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.

Date

Judi Orlando

Signature

2/28/2019



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: <u>Consulting Services for Organizational Development</u>

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

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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

28- Feb-19

Date



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: <u>Consulting Services for Organizational Development</u>

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