

State of Maine
Master Score Sheet

RFP# 202104061						
Equity Audit and Training						
Bidder Name:		Cognia	Crowe LLP	CTR	designEDengagement	
Proposed Cost:		\$148,898	\$69,000	\$75,000	\$49,600	
Scoring Sections	Points Available					
Section I: Preliminary Information	NA					
Section II: Organization Qualifications and Experience	30	15	15	17	28	
Section III: Proposed Services	35	20	15	17	32	
Section IV: Cost Proposal	35	8.24	17.75	16.33	24.70	
TOTAL	<u>100</u>	<u>43.24</u>	<u>47.75</u>	<u>50.33</u>	<u>84.70</u>	
Bidder Name:		District Management Group	Integrative Inquiry	Kitamba	Letterman White Consulting	
Proposed Cost:		\$150,000	\$51,548	\$225,600	\$115,820	
Scoring Sections	Points Available					
Section I: Preliminary Information	NA					
Section II: Organization Qualifications and Experience	30	15	30	20	18	
Section III: Proposed Services	35	11	35	35	25	
Section IV: Cost Proposal	35	8.17	23.76	5.43	10.58	
TOTAL	<u>100</u>	<u>34.17</u>	<u>88.76</u>	<u>60.43</u>	<u>53.58</u>	

Bidder Name:		Mindbridge Center	Phase Consulting Partners	Public Consulting Group	Rethinc
Proposed Cost:		\$45,000	\$148,500	\$129,000	\$257,600
Scoring Sections	Points Available				
Section I: Preliminary Information	NA				
Section II: Organization Qualifications and Experience	30	27	5	23	27
Section III: Proposed Services	35	17	9	28	32
Section IV: Cost Proposal	35	27.22	8.25	9.50	4.76
TOTAL	<u>100</u>	<u>71.22</u>	<u>22.25</u>	<u>60.50</u>	<u>63.76</u>
Bidder Name:		Tangible Development	UPD Consulting	WestED	Zilo International Group
Proposed Cost:		\$91,650	\$250,000	\$334,705	\$35,000
Scoring Sections	Points Available				
Section I: Preliminary Information	NA				
Section II: Organization Qualifications and Experience	30	19	28	28	7
Section III: Proposed Services	35	22	35	30	13
Section IV: Cost Proposal	35	13.37	4.90	3.66	35
TOTAL	<u>100</u>	<u>54.37</u>	<u>67.90</u>	<u>61.66</u>	<u>55.00</u>

Award Justification Statement

RFP# 202104061

I. Summary

The Department seeks a service provider to assist with an internal departmental equity audit which will examine the Department's policies and practices (internal and state policies we implement), as well as analyze the findings, provide coaching, and be a thought-partner in creating a strategic plan for addressing any findings or suggestions. The Department's intent is for the work to be multi-pronged including the individuals who make up the organization, the divisions within the organization and the overall Department. Information and experiences may be used to help showcase the process and serve as an example for other organizations and the education system in the State of Maine.

The Department seeks individual and departmental equity analysis with strategic planning around professional development and implementation of results. Specific areas should include, but are not limited to, hiring and promotion rates, policies and practices, organizational leadership, pay equity and culturally inclusive implications. Confidentiality and discretion will be expected as appropriate, and work will include unlimited amounts of meetings, preparation, work groups, focus groups, research, presentations, professional development and reports. All work will be done with the effort to help meet the Department's strategic goals and public commitments to equity and elimination of structures that contribute to systemic racism.

II. Evaluation Process

An evaluation team, composed of qualified reviewers, including subject matter experts, financial and business experts, and representation from an internal Diversity, Equity, and Inclusion (DEI) committee, judged the merits of the proposals received in accordance with the criteria defined in the RFP. Officials reviewed each proposal separately against the RFP criteria only, making sure the selection process presented equal opportunity and appropriate consideration to all who applied. The evaluation team used a consensus approach to evaluate and score Sections II & III above. Members of the evaluation team did not score those sections individually but, instead, met for a day long review to arrive at a consensus as to assignment of points for each of those sections. Sections IV, the Cost Proposal, was assigned a score according to a mathematical formula using the total cost proposed for conducting all the functions specified in the RFP. The lowest proposed cost was awarded 35 points. Proposals with higher bids values were awarded proportionately fewer points calculated in comparison with the lowest bid. The scoring formula is: (Lowest submitted cost proposal / Cost of proposal being scored) x 35 = pro-rated score

III. Qualifications & Experience

The conditionally awarded Bidder, Interactive Inquiry, presented the following relevant qualifications and experience to perform the work described in the RFP:

- Previous relevant experiences within local communities, schools and educational system.
- Relevant DEI work dealing with education, public and/or multi sector industries.
- Specific work and training within the areas of diversity, equity, and inclusion.
- Experience with helping organizations develop strategic DEI plans.
- Experience utilizing various educational platforms and resources to target multiple adult learners.
- Conveyed understanding of specific challenges related to rural environments for this work through their experiences and partnerships.

IV. Proposed Services

The evaluation team found the following highlights of the conditionally awarded Bidder's proposal to be significant when scoring the proposed services:

- Specific lens to the Department of Education and not to the students or schools. This is an internally focused product that's case study could be used for external purposes, but all work is internal.

- Detailed and comprehensive descriptions of the work to be performed. Provided a very clear picture of what would be expected.
- Indicated the work would be performed by Bidder and not pushed back on the Department.
- Work will be performed within the timeframe specified in the RFP initial contract timeframe.
- Provided a detailed work plan that clearly assigned responsibilities.
- Thoughtful considerations to the various methods needed for adult learners and the different knowledge and readiness situations that could be happening congruently.

V. Cost Proposal

The lowest cost proposal score which was awarded the full 35 points was \$35,000.00. The cost proposals ranged from \$35,000.00 to \$334,705.00. The conditionally awarded bidder was the fourth lowest, with a proposed cost of \$51,548.00.

VI. Conclusion

The conditionally awarded bidder, Interactive Inquiry, achieved the full amount of points for the both the organizational qualifications and proposed services sections. The review committee was particularly interested in the various multi sector and other relevant experiences including those within education and the public sectors. As community leaders in the area of diversity, equity and inclusion the team presented of the owner and all the subcontractors gave a great deal of confidence to the specific skillsets that would be available for Maine specific topics. The inclusion of a cultural translator and individual with New Mainer experience was of particular interest and the organization presented as a small but fiscally sound organization without litigation.

When addressing the proposed services, there was clear designation of responsibilities and a primary contact established, along with utilization of topic expert sub-contractors to deliver services. Specific issues around power dynamics in the workplace, customizable options for trainings and services, and a concise list of deliverables and explanations around expectations were all notable benefits to the plan. The evaluation team was impressed with the efforts for in person retreats which allow for this work to be approached in a very human centered way, with back up options in the event the in-person was not possible. There was a great understanding by the evaluation team of how this work would be approached, specific deliverables and outcomes utilizing a RACI model, and approaches that included such deliverables as a demographics survey, policy analysis, culture map, and multiple language translations. The workplan consists of both individual and focus group work, surveys, research and collaboration with DOE throughout the process with the end result being new tools for ongoing use, a multi-year DEI strategic plan and training curriculum for staff.

Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: thomas.gilllin@cognia.org
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Thomas Gillin
Cognia
9115 Westside Parkway
Alpharetta, GA 30009-8000

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Thomas Gillin:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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:

- Integrative Inquiry LLC

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

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

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

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

Sincerely,



Jessica Nixon
Chief of Operations

STATEMENT OF APPEAL RIGHTS

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

Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: Mark.Maraccini@crowe.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



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Commissioner**

July 22, 2021

Mark Maraccini
Crowe LLP
One Mid America Plaza, Suite 700
Oakbrook Terrace, IL 60181-4707

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Mark Maraccini:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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Chief of Operations

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: agonzalez@ctfactor.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



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DEPARTMENT OF EDUCATION**

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July 22, 2021

Anita Gonzalez-Scott
CTR
3848 Flatiron Loop, Suite 102-5
Wesley Chapel, FL 33544-0000

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Anita Gonzalez-Scott:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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Chief of Operations

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: claire@designedengagement.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



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July 22, 2021

Dr. Claire Hagen Alvarado
designEDengagement
900 E. Pecan St., Suite 300 - PMB 216
Pflugerville, TX 78660

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Dr. Claire Hagen Alvarado:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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Chief of Operations

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: kcervantes@dmgroupk12.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



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July 22, 2021

Kristen Schnibbe Cervantes
District Management Group
133 Federal Street
Boston, MA 02110

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Kristen Schnibbe Cervantes:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Sincerely,



Jessica Nixon
Chief of Operations

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: ksitham@integrativeinquiryllc.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



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July 22, 2021

Katherine Stitham
Integrative Inquiry
55 Burnt Hill Rd
Bass Harbor, ME 04653

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Katherine Stitham:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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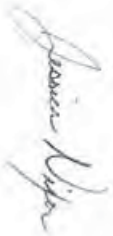
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Sincerely,



Jessica Nixon
Chief of Operations

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: rbajaj@kitamba.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



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**Janet T. Mills
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July 22, 2021

Rajeev Bajaj
Kitamba
300 Broadacres Drive, Suite 150
Bloomfield, NJ 07003

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Rajeev Bajaj:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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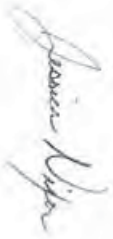
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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: susan@LettermanWhite.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Susan Letterman White
Letterman White Consulting
120 Holmes Street #216
Quincy, MA 02171

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Susan Letterman White:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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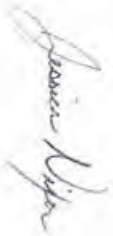
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Chief of Operations

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: lligouri@mindbridgcenter.org
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
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**Pender Makin
Commissioner**

July 22, 2021

Laura Liguori
Mindbridge Center
428 Fore Street
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Laura Liguori:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: James.Armistead@PhaseCP.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



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Governor**

**Pender Makin
Commissioner**

July 22, 2021

James B. Armistead
Phase Consulting Partners
1880 S. Treasure Drive, Unit 3B
North Bay Village, FL 33141

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear James B. Armistead:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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:

- Integrative Inquiry LLC

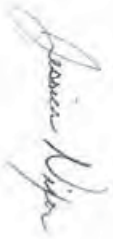
The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice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

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

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

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

Sincerely,



Jessica Nixon
Chief of Operations

STATEMENT OF APPEAL RIGHTS

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

Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: adentremont@pcgus.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Anna d'Entremont
Public Consulting
148 State Street, 10th floor
Boston, MA 02109

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Anna d'Entremont:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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:

- Integrative Inquiry LLC

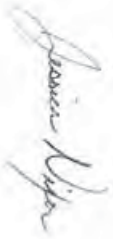
The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice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

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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.

Sincerely,



Jessica Nixon
Chief of Operations

STATEMENT OF APPEAL RIGHTS

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: samanthaahoare@rethinc.us
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Samantha Hoare
Rethinc
39 West 68th Street, #2
New York, NY 10023

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Samantha Hoare:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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:

- Integrative Inquiry LLC

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

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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.

Sincerely,



Jessica Nixon
Chief of Operations

STATEMENT OF APPEAL RIGHTS

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: sujata@tangibledevelopment.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Sujata Chaudhry
Tangible
4 Century Hill Drive
Latham, NY 12110

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Sujata Chaudhry:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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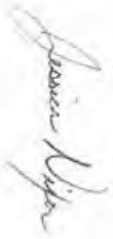
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This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

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

Sincerely,



Jessica Nixon
Chief of Operations

STATEMENT OF APPEAL RIGHTS

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: daustin@updconsulting.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Douglass Austin
UPD Consulting
2526 Saint Paul St.
Baltimore, ME 21218

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Douglass Austin:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

Sincerely,



Jessica Nixon
Chief of Operations

STATEMENT OF APPEAL RIGHTS

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: contracts@wested.org
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Rajwant Virk
WestED
730 Harrison Street
San Francisco, CA 94107

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Rajwant Virk:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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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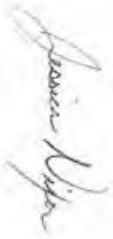
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This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

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

Sincerely,



Jessica Nixon
Chief of Operations

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Dean, Jordan

From: Nixon, Jessica
Sent: Thursday, July 22, 2021 11:49 AM
To: Milena@ZiloInternational.com
Subject: Notice of Conditional Award Notification Letter Equity Audit and Training



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

July 22, 2021

Milena Zilo
Zilo
3939 East Arapahoe Road, Suite 210
Centennial, CO 80122

SUBJECT: Notice of Conditional Contract Award(s) under RFP # 202104061,
Equity Audit and Training

Dear Milena Zilo:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for Equity Audit and Training. 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:

- Integrative Inquiry LLC

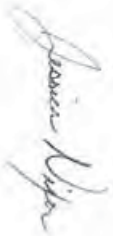
The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice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

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

Sincerely,



Jessica Nixon
Chief of Operations

STATEMENT OF APPEAL RIGHTS

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Cognia
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none">All interested parties are invited to submit a proposal in response to this RFP	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15
Section III. Proposed Services	35	20
Section IV. Cost Proposal	35	8.24
<u>Total Points</u>	<u>100</u>	<u>43.24</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Cognia

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Cognia
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder is a larger company with a lot of experience with state government and education, including Maine DOE; however, the response did not provide a lot of evidence of DEI experience.
 - The response listed projects that were not relevant to DEI. This raised questions among the evaluators about their exact DEI experience or how their experience would translate into this work.
 - The identified personnel had significant PHD and academia focus, but there were questions about actual experience in general public education system
 - The bidder's experience based on the information in the response seemed primarily assessment focused.
 - The bidder did provide information about its recent merger.
 - The response focused more on performance learning and less inward.
 - Overall, the bidder has some good experience, but most of it did not appear to be related to DEI.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Gave one, at the chart
- IV. Litigation
 - None
- V. Financial Viability
 - OK
- VI. Certificate of Insurances
 - OK

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Cognia
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	20

Evaluation Team Comments:

- Overall, the proposal did not appear to be very tailored to the Department's needs. The evaluators noted that it would have been beneficial to see greater inclusion of DOE specifics.
- The evaluators appreciated the equity continuum survey in the proposal. There were questions on internal or research based.
- The evaluators had questions about the Department's and the bidder's role regarding the creation of the executive summary. It read as though the provider's team would guide the executive summary, which made it unclear if the Department would be responsible for writing it.
- The evaluators would have also liked more clarity on the informal observations of the Department. It was unclear how this would be accomplished especially in the current work from home environment.
- There was general concern among the evaluators about the amount of work that Department staff would be responsible for under this proposal.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Cognia
DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$148,598	x	35 points	=	8.24

Evaluation Team Comments:

Per Person Cost - \$826

High, the number of staff are likely dictating costs

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Crowe LLP
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15
Section III. Proposed Services	35	15
Section IV. Cost Proposal	35	17.75
<u>Total Points</u>	<u>100</u>	<u>47.75</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Crowe LLP

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Crowe LLP
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15

Evaluation Team Comments:

- I. Overview of the Organization
 - The response provided evidence of grounded experience in auditing.
 - However, most of their DEI experience seems to be internal. DEI was not listed in audit services. The evaluators noted the subcontractor experience in DEI.
 - Although the response included three example projects, none had a DEI had a focus.
- II. Subcontractors
 - Includes a subcontractor with eight years evaluating DEI
- III. Organizational Chart
 - Included
- IV. Litigation
 - The proposal notes pending but does not disclose specifics.
- V. Financial Viability
 - The bidder did not provide financial viability information; therefore, the evaluators were not able to determine viability. If awarded the contract, the Department will need to obtain this information.
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Crowe LLP
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	15

Evaluation Team Comments:

- Overall, the proposal did not appear to be very tailored to the Department's needs. The evaluators noted that it would have been beneficial to see greater inclusion of DOE specifics as it read as though the proposal could have been written for any other audit request.
- The proposal contained limited specifics which made it difficult for the evaluators to have a clear idea of the work that would be performed.
- Importantly, the proposal did not contain much discussion about "equity", which is the type of audit requested under this RFP.
- The proposed did not seem to factor in that everyone might be at different purposes and personnel services
- The project management template that was in the proposal was a positive.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Crowe LLP

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$69,000	x	35 points	=	17.75

Evaluation Team Comments:

Per Person Cost - \$383

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: CTR
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	17
Section III. Proposed Services	35	17
Section IV. Cost Proposal	35	16.33
<u>Total Points</u>	<u>100</u>	<u>50.33</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: CTR

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: CTR
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	17

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder has experience with military and government entities
 - The response provided evidence of diversity credentials and experiences
 - The bidder provided relevant and specific project experience in DEI that demonstrated the bidder's capability
 - The bidder's response did not demonstrate as much experience with audit, but the evaluators noted the subcontractor experience in this area.
- II. Subcontractors
 - RSM is the subcontractor who has audit, tax, consulting experience
- III. Organizational Chart
 - The provided organizational chart showed that the personnel involved have impressive backgrounds
- IV. Litigation
 - None
- V. Financial Viability
 - The bidder did not provide financial viability information; therefore, the evaluators were not able to determine viability. If awarded the contract, the Department will need to obtain this information.
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: CTR
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	17

Evaluation Team Comments:

- The proposal was a little confusing with its menu of option for services. It was not clear if the bidder was proposing all of them or how it related to the proposed cost. The proposal did recommend at least two of the six options.
- The proposal contained best practices, but they were not relevant or aligned to the work of the Department/Education. Their inclusion raised question about whether the bidder fully understood the work being requested.
- The proposal did not mention long-term cycle, but instead it was just a picture of time
- The proposal was not always clear in its identification of the who would be doing all the work.
- The proposal was concise and did not contain unnecessary/unrelated language, which was appreciated.
- The evaluators noted that the progress report and deliverables were a positive.
- The proposal contained a mention about paying in advance for services. This is something that if awarded the contract, the Department would need to negotiate with the provider as this is not something the department legally can do.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: CTR

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$75,000	x	35 points	=	16.33

Evaluation Team Comments:

Per Person Cost - \$417

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: designEDengagement
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28
Section III. Proposed Services	35	32
Section IV. Cost Proposal	35	24.70
<u>Total Points</u>	<u>100</u>	<u>84.70</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: designEDengagement

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: designEDengagement
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder is a new company.
 - The evaluators appreciated how the response noted drawing from perspectives and the Department's community. There was a real focus on community.
 - The proposal contained evidence of relevant experience in projects. This was a positive of note that the diversity work with the Texas Education staff that is on-going
 - The evaluators noted the emphasis of Human Centered Design, which was a positive
 - The bidder lacks experience working with state government entities
- II. Subcontractors
 - The response contained limited information about the subcontractor, but the information did note a DEI focus
- III. Organizational Chart
 - Small team, outside hub and have resources
- IV. Litigation
 - None
- V. Financial Viability
 - Good for new financials
- VI. Certificate of Insurances
 - Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: designEDengagement
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	32

Evaluation Team Comments:

- The proposal had a lot of emphasis on coworking/partnership with Department team and included lots of collaboration. This was seen as a positive.
- However, there was a perceived dependence on staff for leading this work that was a concern that the Department would need additional clarity on.
- Overall, the proposal did not contain a lot of detail, but it included what was needed for the evaluators to envision the work and it was tied back to the RFP. The response was written and presented in a way to that it felt tailored to the Department's needs as expressed in the RFP.
- The workplan, timeline, deliverables that were included in the proposal were beneficial and a positive.
- The proposal showed an awareness of sensitivity of the various issues and this was seen as positive and evidence of experience.
- The response showed in-depth awareness of training
- The proposal demonstrated the value of organization and community

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: designEDengagement

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$49,600	x	35 points	=	24.70

Evaluation Team Comments:

Per Person Cost - \$276

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: District Management Group
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15
Section III. Proposed Services	35	11
Section IV. Cost Proposal	35	8.17
<u>Total Points</u>	<u>100</u>	<u>34.17</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: District Management Group
DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: District Management Group
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder has previously worked with Nevada and RI State Departments, but not in DEI.
 - Not all the projects listed were DEI focused or relevant to the services needed.
 - The response showed the bidder's history has been more focused on district work, student outcomes etc.
- II. Subcontractors
 - NA
- III. Organizational Chart
 - The chart showed that there were a lot of openings. Overall, it did not contain a lot of detail. They do have an equity office within learning division
- IV. Litigation
 - None
- V. Financial Viability
 - Although the bidder stated that they are financially viable, they did not provide financial viability documentation; therefore, the evaluators were not able to determine viability. If awarded the contract, the Department will need to obtain this information.
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: District Management Group
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	11

Evaluation Team Comments:

- The introduction indicated knowledge of DEI, but the proposal raised questions of whether understood the Department's needs.
- Overall, the proposal did not appear to be very tailored to the Department's needs. The evaluators noted that it would have been beneficial to see greater inclusion of DOE specifics.
- The proposal lacked clarity as to who would be doing what work.
- The proposal included an equity opportunity review/equity coalition and interviews focus groups
- The proposal did include data focused analysis
- The proposal focused a lot on district level, which does not correlate to the needs of the department. For example, it mentioned student academic performance indicators, which although important, may not be the most relevant indicator for this project at this time.
- The proposal did not contain the requested workplan.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training
BIDDER: District Management Group

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$150,000	x	35 points	=	8.17

Evaluation Team Comments:

Per Person Cost - \$833

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Integrative Inquiry
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	30
Section III. Proposed Services	35	35
Section IV. Cost Proposal	35	23.76
<u>Total Points</u>	<u>100</u>	<u>88.76</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Intergrative Inquiry

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Intergrative Inquiry
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	30

Evaluation Team Comments:

- I. Overview of the Organization
 - Clear details and understandable.
 - The proposal demonstrated relevant DEI experience and experience in Maine.
 - The bidder has demonstrated previous work within the community.
 - The projects listed evidenced the capability of the bidder in this work and showed multi sector experience
 - The bidder has experience in education and the public sector. Although has not worked with state agency, they have worked with Maine schools and other organizations.
 - The bidder has previously completed equity audits and training to various organizations statewide.
- II. Subcontractors
 - New Mainer and Immigrant experience
 - Cultural translator
 - As needed, most of work will be done within organization
- III. Organizational Chart
 - Provided
- IV. Litigation
 - None
- V. Financial Viability
 - Provided
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Integrative Inquiry
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	35

Evaluation Team Comments:

- Overall, this proposal was clear and outlined the services that would be provided, which were tied back to the RFP and to the Department's need.
- There would be one person who would act as a direct contact. The proposal did note that some of the sub-contractors will provide some of the direct services
- The proposal included in person retreats
- Incorporating Power dynamics into trainings and discussions
- Proposal indicated that trainings will be customized to fit the Department's needs
- Concise and listed deliverables and explained expectations
- Detailed demonstrations of how they work and approach to policy
- In depth Demographic survey
- Development of Culture Map
- Detailed list of specific outcomes
- Multiple language translation opportunities
- RACI method used for project management and communication
- Proposal submitted timeline went beyond the timeline indicated in the RFP however they indicated an ability to reduce to the timeline we had provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Intergrative Inquiry

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$51,548	x	35 points	=	23.76

Evaluation Team Comments:

Per Person Cost - \$286

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Kitamba
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	20
Section III. Proposed Services	35	35
Section IV. Cost Proposal	35	5.43
<u>Total Points</u>	<u>100</u>	<u>60.43</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Kitamba

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Kitamba
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	20

Evaluation Team Comments:

- I. Overview of the Organization
 - The response highlighted value of lived experience and internal journey.
 - The projects listed as examples were not linked to DEI work and not directly related.
 - The bidder has experience in education – school and student focus.
 - There were questions of how familiar the bidder is with rural communities.
- II. Subcontractors
 - None
- III. Organizational Chart
 - Provided, but does not provide the names of the people involved just their titles. Overall, it was not very descriptive.
- IV. Litigation
 - None
- V. Financial Viability
 - Yes
- VI. Certificate of Insurances
 - Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Kitamba
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	35

Evaluation Team Comments:

- Overall, the proposal was detailed and there was evidence of thought and consideration behind the plan. It was written with the Department's RFP in mind.
- The proposal was clearly stated, which made it easy to follow and understand.
- The inclusion of key questions was very beneficial and demonstrated understanding of the work, the needs of the Department, and the thought process.
- The deliverables were detailed and the workplan provide timeline, tasks, and owners that clearly showed to the evaluators what would be happening, when, and by whom.
- The plan included stakeholder involvement, engagement of leadership, and a roadmap.
- The plan also was realistic given the factors involved.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Kitamba
DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$225,600	x	35 points	=	5.43

Evaluation Team Comments:

Per Person Cost - \$1,253

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Letterman White Consulting
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	18
Section III. Proposed Services	35	25
Section IV. Cost Proposal	35	10.58
<u>Total Points</u>	<u>100</u>	<u>53.58</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Letterman White Consulting

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Letterman White Consulting
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	18

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder has experience in New England
 - The bidder is an experienced consulting firm
 - The bidder has experience in DEI work with state agencies
 - The proposal showed experience and use of iterative cycles
 - The proposal included projects that included relevant state agencies and clients; however, did not include any with an education entity.
- II. Subcontractors
 - none
- III. Organizational Chart
 - The organization chart listed the individual responsibilities
- IV. Litigation
 - no
- V. Financial Viability
 - They did not provide financial viability documentation; therefore, the evaluators were not able to determine viability. If awarded the contract, the Department will need to obtain this information.
- VI. Certificate of Insurances
 - Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Letterman White Consulting
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	25

Evaluation Team Comments:

- The proposal highlighted working collaboratively to protect the Department's strategic priority
- The proposal included metrics which was a positive
- The evaluators thought the workshops mentioned were interesting
- The inclusion of reference to psychological safety and power struggle was a positive
- Additional mentions/inclusion of relationship building and support and guidance in the proposal would have been beneficial.
- There were interesting points on communication
- The proposal was clear although repetitive in parts. It contained action research.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Letterman White Consulting

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$115,820	x	35 points	=	10.58

Evaluation Team Comments:

Per Person Cost - \$643

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Mindbridge Center
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	27
Section III. Proposed Services	35	17
Section IV. Cost Proposal	35	27.22
<u>Total Points</u>	<u>100</u>	<u>71.22</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Mindbridge Center

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Mindbridge Center
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	27

Evaluation Team Comments:

- I. Overview of the Organization
 - The response shows experience in science based and research based
 - The bidder has experience at federal level and working with schools
 - The bidder has experience with workshops
 - The response included detailed information about relevant projects.
- II. Subcontractors
 - None stated
- III. Organizational Chart
 - Provided, but was a little confusing and contained little details
- IV. Litigation
 - Not stated
- V. Financial Viability
 - Taxes
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Mindbridge Center
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	17

Evaluation Team Comments:

- The plan includes a five-component process, but only one was within the timeframe requested in the RFP.
- The plan would make DOE the central resource for schools.
- The plan includes very detailed sessions that would be a big-time commitment for DOE staff
- Much of the proposal does not fit into the timeline described in the RFP.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Mindbridge Center

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$45,000	x	35 points	=	27.22

Evaluation Team Comments:

Per Person Cost - \$250

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Phase Consulting Partners
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	5
Section III. Proposed Services	35	9
Section IV. Cost Proposal	35	8.25
<u>Total Points</u>	<u>100</u>	<u>22.25</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Phase Consulting Partners

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Phase Consulting Partners
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	5

Evaluation Team Comments:

- I. Overview of the Organization
 - The projects listed were not relevant or had little relevance to the services in the RFP.
 - The bidder did not provide a lot of information and what was provided was vague. Additionally, the bidder did not follow the format.
 - The bidder specializes in strategic consulting.
 - The lack of information and relevant experience made it difficult to ascertain the background and experience for this RFP
- II. Subcontractors
 - None
- III. Organizational Chart
 - Provided, but contained little information
- IV. Litigation
 - None
- V. Financial Viability
 - Did not provide financials
- VI. Certificate of Insurances
 - Not provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Phase Consulting Partners
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	9

Evaluation Team Comments:

- Overall, the proposal was vague and contained few specific details. It further was not tailored to the needs of the Department as outlined in the RFP.
- Some of the information mentioned were confusing such as the use of social media.
- The proposal was difficult to measure against the RFP given the few details in the proposal.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Phase Consulting Partners

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$148,500	x	35 points	=	8.25

Evaluation Team Comments:

Per Person Cost - \$825

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Public Consulting
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	23
Section III. Proposed Services	35	28
Section IV. Cost Proposal	35	9.50
<u>Total Points</u>	<u>100</u>	<u>60.50</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Public Consulting

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Public Consulting
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	23

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder is a large organization
 - The bidder has worked with state education agencies and public schools
 - A lot of the work in education is not DEI related
 - The projects listed had some relevancy but were not directly related to the ask of RFP
 - Some examples were not yet completed but were in the works.
- II. Subcontractors
 - The subcontractor adds more education experience of working with school and subject matter experience to the team
- III. Organizational Chart
 - Descriptive
- IV. Litigation
 - The is a lot of litigation listed, but not unexpected with a company of this size, but did have one contract related suit regarding timelines and deliverables
- V. Financial Viability
 - Yes
- VI. Certificate of Insurances
 - Not included, will need to get this if awarded contract

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Public Consulting
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	28

Evaluation Team Comments:

- Overall, the proposal contains the minimum amount of information and notably it was not tailored to the Department's needs. The evaluators noted that it would have been beneficial to see greater inclusion of DOE specifics.
- The plan does include agreed to metrics and deliverables.
- The workplan lacked clarity as to who would be doing the activities/tasks but did provide clear outline as to the work activities and deliverables.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Public Consulting

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$129,000	x	35 points	=	9.50

Evaluation Team Comments:

Per Person Cost - \$717

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Rethinc
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	27
Section III. Proposed Services	35	32
Section IV. Cost Proposal	35	4.76
<u>Total Points</u>	<u>100</u>	<u>63.76</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Rethinc

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**



Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Rethinc
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	27

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder is a brand-new company
 - The response indicated awareness of the framing and have a lot of experience. The bidder emphasized that it is safe to not know what to do next.
 - The bidder's work has focused on adult learning. Relevant experience
 - The bidder only provided two examples, which is likely a reflection of the company being so young.
- II. Subcontractors
 - The response highlights the "do work while continue work" approach.
 - There are nine subcontractors with a variety of experiences and bios. The mix showed a recognition of various needs and voices.
- III. Organizational Chart
 - Did not provide much information, small and doing a lot with subcontractors
- IV. Litigation
 - No
- V. Financial Viability
 - Financial provided currently expenses exceed income
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Rethinc
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	32

Evaluation Team Comments:

- The proposal highlighted learning about safety and wellness in equity.
- It included a lot of DEI committee focus and professional development through the term of the work and not just at the end.
- The proposal recognized work the Department had already done and would build upon it.
- The inclusion of measurements and deliverables was a positive
- The proposal had a focus on human capital and talent
- The Department's DEI Committee gets a lot of focus in the proposal and there was concern about the amount of work they may be responsible for in this plan.
- The workplan was detailed but was not clear who is doing what work.
- Overall, it was good proposal and plan.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Rethinc

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$257,600	x	35 points	=	4.76

Evaluation Team Comments:

Per Person Cost - \$1,431

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Tangible
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	19
Section III. Proposed Services	35	32
Section IV. Cost Proposal	35	13.37
<u>Total Points</u>	<u>100</u>	<u>64.37</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Tangible

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Tangible
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	19

Evaluation Team Comments:

- I. Overview of the Organization
 - The response mentions “the city”, which raised questions about whether the response was copied from a different response and mistakenly not changed.
 - The bidder has experience with equity audits. The response mentioned two, but appear to have been limited to school municipalities
 - There was lack of state level education experience.
 - The bidder is experienced in DEI work.
 - The response only included two projects and not three.
- II. Subcontractors
 - None – Siena College was mentioned though in the response
- III. Organizational Chart
 - Team experienced, specific DEI roles
- IV. Litigation
 - no
- V. Financial Viability
 - yes
- VI. Certificate of Insurances
 - yes

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Tangible
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	22

Evaluation Team Comments:

- The proposal includes the creation of focus groups with identity bases, leadership readiness, and futuring exercises
- The plan contained three phases.
- A workplan with deliverables was included.
- The timeline of the plan is an estimated 12 months, meaning much of the proposal does not fit into the timeline described in the RFP.
- There was mention of the work plan would be owned by the Provider, which is counter to the intent of the Department. Additionally, it mentioned half payment upfront, which is something the Department legally cannot do. These would need to be negotiated if awarded a contract.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Tangible

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$91,650	x	35 points	=	13.37

Evaluation Team Comments:

Per Person Cost - \$509

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: UPD Consulting
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28
Section III. Proposed Services	35	35
Section IV. Cost Proposal	35	4.90
<u>Total Points</u>	<u>100</u>	<u>67.90</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: UPD Consulting

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: UPD Consulting
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28

Evaluation Team Comments:

- I. Overview of the Organization
 - The response contained specific experiences and good examples
 - The bidder mentioned one on one coaching – IDI
 - The provider is established and was formed in 2006
 - The bidder’s specific strength is in diversity and history of this type of work
- II. Subcontractors
 - IDI work with Valburn
- III. Organizational Chart
 - Nice org chart and specific teamwork
 - Additional information on what these roles do would have been helpful
- IV. Litigation
 - none
- V. Financial Viability
 - good
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: UPD Consulting
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	35

Evaluation Team Comments:

- Overall, the plan proposed met all the requirements listed in the RFP, was very detailed, and was within the timeframe described in the RFP.
- The plan proposed a multiple phase solution and contained thorough descriptions
- Notably, the proposal highlighted the awareness. This was a positive to the evaluators.
- The proposal included RACI concept, IDI and individual sessions.
- The proposal includes SMART goals
- The response contained a number of key questions that were helpful and showed a great understanding of the issues.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: UPD Consulting

DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$250,000	x	35 points	=	4.90

Evaluation Team Comments:

Per Person Cost - \$1,389

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Wasted
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28
Section III. Proposed Services	35	30
Section IV. Cost Proposal	35	3.66
<u>Total Points</u>	<u>100</u>	<u>61.66</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Wasted

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Wasted
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28

Evaluation Team Comments:

- I. Overview of the Organization
 - The bidder is a larger organization with multiple branches with both national and local experience
 - The bidder has done work with the Department previously (TIF)
 - The bidder has technical assistance centers
 - The proposal noted work they have done with states and provided good on point projects
 - There was some included information may not have been relevant to scoring of this section
- II. Subcontractors
 - None
- III. Organizational Chart
 - Yes – large organization – 4 teams and 12 staff heavily resourced
- IV. Litigation
 - Yes, but was not unexpected given the size of the company
- V. Financial Viability
 - Yes
- VI. Certificate of Insurances
 - Yes

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Wasted
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	30

Evaluation Team Comments:

- The plan noted the use of culturally responsive pedagogy and adult learning theory. This was a positive.
- The plan had a focus on input to the field
- The plan did have a lot of school environment mention, which added confusion as to whether the plan was tailored to the Department or if it was a standard plan for the education environment with little consideration to the fact that this is a state department and not a school.
- The plan included resource allocation review, multiple reviews, surveys, and research
- There was some concern about the amount of work for DOE staff
- Overall the response met the requirements of the RFP and contained interesting concepts and directions.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Wasted
DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$334,705	x	35 points	=	3.66

Evaluation Team Comments:

Per Person Cost - \$1,859

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Zilo
DATE: 6/24/2020

SUMMARY PAGE

Department Name: Education
Name of RFP Coordinator: Jessica Nixon
Names of Evaluators: Mary Hermon, Amelia Lyons, Page Nichols, Jessica Nixon, and Jennifer Tarr

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> All interested parties are invited to submit a proposal in response to this RFP 	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	7
Section III. Proposed Services	35	13
Section IV. Cost Proposal	35	35
<u>Total Points</u>	<u>100</u>	<u>55</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER: Zilo

DATE: 6/24/2020

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Eligible

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Zilo
DATE: 6/24/2020

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	7

Evaluation Team Comments:

- I. Overview of the Organization
 - The response did not include any direct project experiences or any specific examples
 - The response did not provide sufficient detail or project references to other states
 - Some DEI experience with one of the individuals in navy (other none identified)
 - Overall, the response lacked the information that evaluators needed to properly consider the background and experience of the bidder
 - The response made no note of experience in education, or large public systems
 - The proposal was incomplete as it did not provide what was asked
- II. Subcontractors
 - No
- III. Organizational Chart
 - 2 people but not sure of the specific roles
- IV. Litigation
 - No mention
- V. Financial Viability
 - The bidder did not provide financial viability documentation; therefore, the evaluators were not able to determine viability. If awarded the contract, the Department will need to obtain this information.
- VI. Certificate of Insurances
 - yes

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Zilo
DATE: 6/24/2020

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	13

Evaluation Team Comments:

- The proposal did not contain all the needed information and there for was considered to be incomplete.
- The proposal was not tailored to the Department's needs. The evaluators noted that it would have been beneficial to see greater inclusion of DOE specifics.
- The proposal did not provide clear goals and lacked specific and relevant details.
- The work plan had no relation to the specific work and how would accomplish, or specifics on who was involved, evaluators felt there were not enough details on this.
- Although, the evaluators appreciate brevity, the proposal was not tailored to the RFP and did not provide for the specifics needed to do the work that was requested

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER: Zilo
DATE: 6/24/2020

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$35,000	÷	\$35,000	x	35 points	=	35

Evaluation Team Comments:

Per Person Cost - \$194

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Cogna Inc
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Previously merged with various nonprofits, “legacy for progress”
 - Strategic plan for continuous improvement year over year
 - DEI + accessibility
 - Experience working with schools on showing DEI evidence in all instructional components and student activities
 - Positive: Advancing equity in assessment – address legacy of racism in edu assessment thru equitable assessment call to action – dismantle these structures to provide pathways to address other marginalized communities
 - Previously worked with ND, KY, AL DOES
 2. Subcontractors
 - none
 3. Organizational Chart
 - 7-9 staff members to work on this project, 2 co-leads
 - Team has significant educational background... lots of PhDs... how may this influence their ability to truly value lived experiences? To understand the trauma of academia for certain communities? Is their experience based on theory or practice?
- II. Proposed Services
 1. Services to be Provided
 - Focus groups, presentations, pre-survey
 - “evidence based practices that align with root cause analysis”
 - Multi year strategic plan
 - Equity consciousness survey (sounds like IDI) – sample question 1 is good, 2 is ok “I show sensitivity toward each person’s needs through my words and actions”?
 - Department-authored executive summary – does this mean we will write it?—yes but it has a template
 - General observations around the department – how will this be done with WFH?

The application is 80+ pages... is this really the approach we want to take?
Cost proposal: 148,598 or 826 per DOE employee

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Cognia Inc
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Measured progress
 - Photo of Dome
 - Our logo
 - (2 Ed Imprt orgs)
 - Mark Elgart
 - 9a
 - Schools/Assessment
 - 500 employees worldwide
 - UDL/Assessment
 - Provided litigation, financials and certify of liability
 - Alabama DOE (Cognia Imprt plan)
 2. Subcontractors
 - NA
 3. Organizational Chart
 - Has org chart with staff roles and CVs attached
- II. Proposed Services
 1. Services to be Provided
 - Cognia Equity Engagement Review
 - Customized (team ours)
 - A project planning survey
 2. Implementation – Work Plan
 - Initial planning with 10 ppl, schedule, logistics, q/congruently
 - Prep DOE Staff “equity consciousness survey” Mindset relationships practices
 - *WE draft executive summary
 - P. 12 1. Research/2. Ind survey/3. Original research and literature
 - Informational observations
 - P. 16 5 best stments
 - Findings – envisioning, developing strategy map, planning, strategy map Implementation
- III. Cost
 1. Total
 - 50790
 2. Per employee
 -

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Cognia Inc
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Large corporation
 - Generic proposal
 - Leaner centric standards
 - Professional learning to advance equity
 - DEI taskforce, bias sensitive and review committees, universal design, advisory committee
 2. Subcontractors
 - Have worked with other state depts of education
 - N/A
 -
 -
 3. Organizational Chart
 - 9 people with MDOE at the top of the org chart

- II. Proposed Services
 1. Services to be Provided
 - Equity audit and review
 - Initial planning
 - Instructional prep for MDOE staff
 - Administer equity-conscious survey (how has this been tested)
 - DOE will author executive summary – we write this?
 2. Implementation – Work Plan
 - Policy research, individual staff survey, organizational survey including staff interviews
 - In-depth

- III. Cost
 1. Total
 - \$148,000
 2. Per employee
 - \$826

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Cognia Inc
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Significant experience in education and working with states
 - Experience working with Maine DOE
 - North Dakota Dept. of Public Instruction – continuous improvement and accreditation
 - Kentucky DOE – system of continuous improvement
 - Alabama DOE- system of continuous improvement
 - Although the examples showed experience working with state education agencies, it did not demonstrate experience in the area the RFP focused (equity)
 2. Subcontractors
 - None
 3. Organizational Chart
 - Org chart show that there is a team dedicated to equity
 - Provided CVs and certifications of staff- lots of education experience, did not seem to have as much direct experience in equity.
 4. Litigation
 - None
 5. Financial Viability
 - provided
- II. Proposed Services
 1. Services to be Provided
 - Provides an alternative sequence of tasks than in the RFP – survey at start
 - Two project leads
 - Initial planning meeting
 - Interactive onsite webinar for entire DOE staff
 - Equity consciousness survey (example provided)
 - Selection of quality evidence
 - Noted that it will work to securely manage PII
 - Equity Self-Assessment
 - 15-18 focus groups (10-12 people) entire DOE staff
 - Review all department and state policies
 - Informal observations of the department – not sure what this means or how intrusive
 - Stage 2 is planning – DOE strategy map
 2. Implementation – Work Plan
 - Provided timeline chart
- III. Cost

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

1. Total
 - \$148,598
2. Per employee
 - \$826

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Cognia Inc
DATE: 6/14/21
EVALUATOR NAME: Jessica
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Kibbutz of several major labor groups
 - Performance standards + assessments → new equity programs
 - Many tasks forces w/ equity goals
 2. Subcontractors
 - None
 3. Organizational Chart
 - Equity team of 7
- II. Proposed Services
 1. Services to be Provided
 - 14 mgt order pre engagement / post r deviates
 - Revisited Presentation available
 - Equity - last 3 years survey
 - Equity - last 3 years survey
 - 1 B Focus groups
 - Rally like sample communication
 - Theory work plan
 2. Implementation - Work Plan
- III. Cost
 1. Total • \$148,598
 2. Per employee • 826

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Crowe LLP
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - “DEI expertise grounded in real life experience” yes!
 - 4300 personnel, international org
 - Accounting firm???
 - Sourced hires from underrepresented groups over the previous 3-5 years ... that’s not a long history in this work. Internal business resource groups – affinity groups
 - DEI not listed in their audit services
 2. Subcontractors
 - Kimberly Ellison-Taylor
 3. Organizational Chart
 - Emotional intelligence
 - 8 years experience in DEI
 4. Etc.
 - Refused to provide financials
- II. Proposed Services
 1. Services to be Provided
 - Surveys, focus group – nothing about getting folks “on board” with the whole idea. Seems to assume everyone will be enthusiastic about this work
 - Very generic
 - Project management approach
 2. Implementation – Work Plan
 - TB – the charts and images show continuous improvement and a general process for planning, but no specifics
- III. Cost
 - 69,000
 - 383/employee

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Crowe LLP
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Internal dep'l equity audit analysis, strat plan*
 - **focus on our need*
 - *43,000 personnel*
 - *35*
 - *\$ private (11-4)*
 - *Had legal, org chart, litigation, licensure and insurance*
 - *CA Recycling, Home LLP train the trainer*
 - *City of San Rafael*
 - 2. *Subcontractors*
 - *Key solutions*
 - 3. *Organizational Chart*
 - *Yes and bios*
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - *11-43*
 - *Planning, implementation, findings and planning*
 - 2. *Implementation – Work Plan*
 - *Too cookie cutter*
- III. *Cost*
 - 1. *Total*
 - *69,000*
 - 2. *Per employee*
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Crowe LLP
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Mentions nothing about DEI in opening sections*
 - *National org., offices in 18 states*
 - *A lot of auditing experience but not much related specifically to DEI work*
 - *Past projects: only one mentions DEI*
 - *Internal DEI work (one of their strategies)*
 - *Did not provide financials as requested*
 - 2. *Subcontractors*
 - *KET Solutions – DEI leadership experience over 8 years*
 -
 -
 - 3. *Organizational Chart*
 - *7 staff allocated for this project*
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - *Generic, doesn't address DEI work*
 - *Talks about "meeting the needs of the DOE" without referencing DEI work specifically*
 - 2. *Implementation, findings and planning*
 - *Project planning, implementation, findings and planning*
 - *Understanding of the organization, project planning, surveys, etc.*
 - *Limited specifics*
- III. *Cost*
 - 1. *Total*
 - *\$69,000.00*
 - 2. *Per employee*
 - *\$383.33 (180 staff members)*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Crowe LLP
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Nationwide organization*
 - *Diversity and Inclusion is one of company's top key strategies for itself*
 - *Crowe has been providing auditing services for 75 years and has provided internal audit solutions to over 600 organizations.*
 - *California Department of Recycling and Recovery*
 1. *Cost of recycling beverage containers*
 - *Home LLP*
 1. *Train the trainer*
 - *City of San Rafael*
 - *Wished for greater information on projects and would have liked projects that were similar to one in RFP*
 2. *Subcontractors*
 - *KET Solutions*
 1. *Has DEI experience (8 years)*
 -
 -
 3. *Organizational Chart*
 - *Provided with CVs – experienced in auditing, and some in DEI (Ms, Nag) including contractor*
 4. *Litigation*
 - *Has pending litigation but did not disclose*
 5. *Financial Viability*
 - *Did not provide financial information other than small blurb and chart of revenue/growth- they are available for inspection*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Three phase methodology*
 - *Outline of steps to take*
 - *Provided outline of how it handles this type of work*
 - *Rely on past experience*
 - *Did not provide great detail that was specific to this RFP*
 2. *Implementation – Work Plan*
 - *Policy research*
 - *Individual staff survey*
 - *Organization research*
 - *Timeline end dec. 2021*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

III.	Cost
1.	Total
	• \$69,000
2.	Per employee
	• 383

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Crowe LLP
DATE: 6/14/21
EVALUATOR NAME: *Jessica*
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization - emphasis on negotiations in letter
 - Conduct various audits - financial?
 - Sponsored by 3 examples
 - Large org. w/ focus on diverse culture
 2. Subcontractors
 - 2 yrs prof speaker
 - Questions being inquired + provides specific training
 - 8 years relevant exp.
 3. Organizational Chart
 - Director and others who have experience, others seen for more "subject matter expert" - "Governance?"
- II. Proposed Services
 1. Services to be Provided
 - taking a "project management" approach
 - little discussion of equity or disadvantaged crowd this
 - files on "diversity" seems very template like + not applicable
 2. Implementation - Work Plan
 - whole staff survey questions are what I expect comes on root causes survey but be aware their racial backgrounds.
- III. Cost
 1. Total
 - \$169,000
 2. Per employee
 - \$383.33

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: CTR Factor
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Woman owned, minority owned IDEAL education and advisory services firm
 - 12 years' experience
 - Experience with military DEI work – probably will understand the resistance that can be faced in this type of work
 2. Subcontractors
 - RSM US LLP
 3. Organizational Chart
 - Did not give financial viability

- II. Proposed Services
 1. Services to be Provided
 - Specific details on questions, levels, wording
 - Timeline
 - No mention of long-term plan, or cycle – this is just an audit to see where we're at it looks like to me.
 2. Implementation – Work Plan
 - Included responsible parties
 -

- III. Cost
 1. Total
 - 75,000
 2. Per employee
 - 416

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: CTR Factor
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Minority owned DEI 12 years +*
 - *C level experience*
 - *Idaho*
 - *CT Public Broadcasting*
 - 2. *Subcontractors*
 - *RSM LLP*
 - 3. *Organizational Chart*
 -

- II. *Proposed Services*
 - 1. *Services to be Provided*
 -
 -
 -
 - 2. *Implementation – Work Plan*
 -
 -

- III. *Cost*
 - 1. *Total*
 - *75,000*
 - 2. *Per employee*
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: CTR Factor
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Woman and minority owned
 - IDEAL educational and advisory services since 2008
 - Specific focus on organizational changes related to DEI
 - Military DEI work experience (understanding of potential existence)
 - No education-related examples (except higher education)
 - 2. Subcontractors
 - RSM US LLP
 - Specializes in tax audits
 -
 - 3. Organizational Chart
 - Provided with bios
 - Financial viability not provided
- II. Proposed Services
 - 1. Services to be Provided
 - Evaluation, examination, estimation, conversation, validation, integration
 - All of the above phases are optional
 - Phases conducted sequentially
 - Each phase take 4-6 weeks
 - Half payment before a phase and half after (cannot pay for services in advance)
 - Can customize somewhat here
 - 2. Implementation – Work Plan
 - Phases can be customized
 - Concise plan
- III. Cost
 - 1. Total
 - \$75,000
 - 2. Per employee
 - \$250

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: CTR Factor
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Founded in 2008, focused on DEI*
 - *Idaho National Lab*
 1. *a survey, focus groups, individual interviews and presented the business case for Diversity, Equity and Inclusion*
 - *CT Public Broadcasting*
 1. *a survey, focus groups, individual interviews and presented business case for DEI.*
 - *Anita Collins, Learning & Development Manager*
 1. *Unconscious Bias Training for all senior leaders and employees across the firm.*
 2. *Subcontractors*
 - *RSM US LLP*
 1. *provider of audit, tax and consulting services*
 3. *Organizational Chart*
 - *Provided.*
 - *Demonstrated experience in DEI*
 4. *Litigation*
 - *None*
 5. *Financial*
 - *None provided. Available upon request*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Display of process and different phases*
 1. *Recommends at least two phases*
 2. *Reports at each phase*
 3. *4-6 weeks per phase*
 4. *Noted that half payment (before and after) this is something that would have to worked out during contract negotiations as state cannot prepay for services.*
 - *Provided metrics and descriptions*
 - *Survey of perceptions*
 - *Conversation phase*
 - *Benchmarking of practices*
 2. *Implementation – Work Plan*
 - *Provided chart of implementation with key deliverables with dates and responsible parties - helpful*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

- III. Cost
 - 1. Total
 - \$75,000
 - 2. Per employee
 - \$300

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: CTR Factor
DATE: 6/14/21
EVALUATOR NAME: *Jessica*
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization
 - Specific experience
 - Relevant examples
 - Minority owned + diverse team
2. Subcontractors
 - RSM - audit + tax consultancy
 - Higher education folks
 - Thought leader + diverse workforce - welcome?
3. Organizational Chart
 - pretty impressive backgrounds are very w/ strong diversity files

II. Proposed Services

1. Services to be Provided
 - established plan of services and instructions
 - regular progress reports
 - WGL at all phases of org.
 - helpful visual chart
 - diversified deliverables
2. Implementation - Work Plan

III. Cost

1. Total
 - \$75,000
2. Per employee
 - \$4116.66

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: designEDengagement
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Latina owned
 - Launched in 2019
 - Human centered program design
 - Change systems, improve relationships, impact student outcomes
 - “to draw from tremendous insights and talents within the department’s community”
 - First generation immigrant
 - 4 separate emails for 4 attachments?
 - 2. Subcontractors
 - Natalie Flores
 - 3. Organizational Chart
 - 3 staff members
 - Did provide financials
 - No litigation
- II. Proposed Services
 - 1. Services to be Provided
 - Codeveloped with stakeholders every voice matters
 - Lived experiences as teachers and education leaders
 - Community agreements
 - Historical and existing context discussion
 - Root cause analysis
 - Roadmap of opportunity – looking forward
 - I really like these proposed services, specific enough and they talk about flexibility they’ll be willing to do.
 - 2. Implementation – Work Plan
 -
 -
- III. Cost
 - 1. Total
 - 49600 (no travel)
 - 2. Per employee
 - 275

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: designEDengagement
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - 2019
 - Human - centered design
 - No litigation, included finances and licensure
 2. *Subcontractors*
 - 1 sub
 3. *Organizational Chart*
 - bios

- II. *Proposed Services*
 1. *Services to be Provided*
 - Section III
 2. *Implementation – Work Plan*
 - July-sept 21
 - Meet key good detail to plan
 - Oct-Nov
 - Rsch
 - Survey
 - Intvs
 - Focus
 - Dec 2021
 - Findings & roadmap

- III. *Cost*
 1. *Total*
 - 49600
 2. *Per employee*
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: designEDengagement
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Latina-owned*
 - *Ensuring that all students have equitable access and outcomes*
 - *Human-centered design*
 - *Talks more about communities and students*
 - *Strengthening team culture and commitment to equity*
 - *No evidence of work with state departments*
 2. *Subcontractors*
 - *Natalie Flores*
 - *Research in equitable policy practices at all levels*
 - *Equity at the center of strategic planning*
 3. *Organizational Chart*
 - *Two lead and "hub experts" at different levels of education across the country*
 - *Provided financials*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Meeting with internal staff, facilitate meetings and focus groups, defining equity with leadership, policy research*
 - *"co-design" staff survey (what exactly does this mean?)*
 - *Review trends*
 - *Review and analyze findings with leadership*
 - *Co-strategic plan with MDOE leadership*
 2. *Implementation – Work Plan*
 - *3 phase implementation*
 - *Timeframe, key deliverables*
 - *Included the important elements of what we needed to know*
- III. *Cost*
 1. *Total*
 - *\$49,600.00*
 2. *Per employee*
 - *\$275.55*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: designEDengagement
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - 2019 start
 - Focused on ensuring student equitable access, outcomes, and opportunity
 - National consulting firm
 - Team of three
 - Equal Opportunity Schools
 1. develop an innovative and equity-based pilot framework and a plan to scale.
 - Hispanic Impact Fund
 1. Equity driven strategic planning project (ongoing)
 - CA State PTA
 1. large-scale family engagement project
 2. Subcontractors
 - Natalie Flores
 1. Education experience and in DEI
 3. Organizational Chart
 - Provided
 - Demonstrated DEI and consulting experience
 4. Litigation
 - None
 5. Financial Viability
 - Provided balance sheets (noted new company)
- II. Proposed Services
 1. Services to be Provided
 - Stresses partnership (liked)
 - integrate both the technical and adaptive nature of work
 - A little more details would have been beneficial
 2. Implementation – Work Plan
 - Provided chart with phases, timeframe, implementation task, and key deliverables which was helpful
 -
- III. Cost
 1. Total
 - \$49,600
 2. Per employee
 - \$275.6

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: designEDengagement
DATE: 6/14/21
EVALUATOR NAME: Jessica
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization ~~provided~~ lateral desk
 - 1. active list of program
 - focus on new and national
 2. Subcontractors Native Flores?
 - invited lgo but appears to use DEI framework
 3. Organizational Chart small team! (but pretty good outside thru some experience however)
- II. Proposed Services
 1. Services to be Provided
 - NOT a ton of detail but consistent w/ RFP ask
 2. Implementation - Work Plan
 - Wide chest + timeline
 - Risk Case Analysis - in this document
- III. Cost
 1. Total
 - \$49600
 2. Per employee
 - \$275.55

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: District Management Group
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Previous work with RI, Nevada DOES- not on DEI though
 2. Subcontractors
 - none
 3. Organizational Chart
 - Many vacancies... will we get new folks doing this work as equity advisors? What would that mean?
 - No financial documents provided

II. Proposed Services

1. Services to be Provided
 - Equity opportunity review instead of audit
 - Great background intro – recognizing what public schooling was designed as and how we can either “perpetuate or disrupt the status quo”
 - 4 common obstacles to increasing equity in state DOES – lack of knowledge, trusted source, political riskiness, unpredictable costs – this is useful background and shows they really know what they’re talking about. Concrete!
2. Implementation – Work Plan
 - Understand context – phase 1: equity coalition self-assessment – this seems to be more targeted for LEAs than SEA. Will require team including families, district leaders
 - Seem to be focused on district – student outcomes. Not sure how much of this is for the ME DOE vs. schools? Seems somewhat irrelevant to ensuring ME DOE is a place people want to work, internal policies, hiring, retention... doesn’t follow RFP clearly.

III. Cost

1. Total
 - 150,000 – no travel included, expected to be ongoing as equity work should be
2. Per employee
 - \$833

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: District Management Group
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Focused on district, district leaders, student outcomes*
 - *“equity opportunity review”*
 - *No litigation/license*
 - *Financial and certificate of insurance*
 - *RI DOE (fed)*
 - *Nevada DOE*
 - *Grants management*
 - 2. *Subcontractors*
 - *no*
 - 3. *Organizational Chart*
 - *yes*

- II. *Proposed Services*
 - 1. *Services to be Provided*
 - *Big obstacles*
 - *DME Equity Office*
 - *Remain Active partners*
 - 2. *Implementation – Work Plan*
 - *Understand contest = eq opp review tools*
 - *Ongoing*
 - *MDOE Eq Coalition – team, stake h, state, dx, tchs, family*
 - *Stud acad perf indic*
 - *Facilitated reflection*
 - *In depth analyst & Plan*
 - *A lot @ DDX*
 - *Sustain*

- III. *Cost*
 - 1. *Total*
 - *150,000*
 - 2. *Per employee*
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: District Management Group
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Supporting education leaders with mgmt. skills*
 - *Have developed an office to focus on equity, cultural practices and mindsets toward equity*
 - *Equity Opportunity Review is their process to use*
 - *Have worked with RI and NV state DE's*
 - *Not all projects were DEI focused*
 2. *Subcontractors*
 - *N/A*
 3. *Organizational Chart*
 - *13 people*
 - *A lot of job openings on their org chart*
 - *No documentation of financials*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Reference "district context" but we are an SEA*
 - *Understanding of challenges of equity work*
 - *Equity coalition self-assessment, in-depth analysis of identified focus areas*
 - *Planning comprehensively using the recommendations*
 - *Student academic performance measures?*
 2. *Implementation – Work Plan*
 - *No clear work plan*
 -
- III. *Cost*
 1. *Total*
 - *\$150,000*
 2. *Per employee*
 - *Proposal says N/A*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: District Management Group
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Founded in 2004*
 - *Address management challenges in public schools*
 - *DMEquityOffice focus on DEI*
 - *Community Consolidated School District 59*
 1. *Equity opportunity review*
 1. *Multiple projects*
 - *Nevada DOE*
 1. *State grant management system alignment*
 - *None*
 2. *Subcontractors*
 1. *State grant management system alignment*
 - *None*
 3. *Organizational Chart*
 - *Provided small chart – did not provide a lot of details*
 4. *Litigation*
 - *None*
 5. *Financial Viability*
 - *Says it is good financial standing but provided no documentation*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Phase 1 Equity Coalition Self-Assessment*
 1. *Equity framework (adult growth and development, community engagement, policies and practices)*
 2. *Student academic performance indicators (does not seem relevant to this RFP)*
 - *Phase 2 -analysis of identified focus areas*
 - *Not really tailored to Maine Doe*
 2. *Implementation – Work Plan*
 - *Could not locate it*
- III. *Cost*
 1. *Total*
 - *\$150,000*
 2. *Per employee*
 - *Not provided*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: District Management Group
DATE: 6/14/21
EVALUATOR NAME: *WSS*
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- History of System level discussion - district?
- has worked w/ State entities but not w/ this agency?
- has worked at the local level?

2. Subcontractors

• NA

3. Organizational Chart

• was Equity Office w/in Long Division

II. Proposed Services

1. Services to be Provided

- Equity Budget, Interviews and focus groups
 - Access to network +
 - Data focused analysis
2. Implementation - Work Plan
- Who is doing the work - not sure clear picture of work plan
 - What is time line

III. Cost

1. Total

• \$150,000

2. Per employee

• 833.33 - didn't break out

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Integrative Inquiry LLC
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Kate is owner and president, would bring in subcontractors*
 - *Has worked for City of Portland, Goodwill NNE, many Maine colleges and universities*
 - *Has done equity audits before*
 - *Has significant Maine experience and equity work and education systems*
 2. *Subcontractors*
 - *Claudette*
 - *Others out of state*
 -
 3. *Organizational Chart*
 - *Did provide financial statements*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Planning –*
 - *Demographic report – race, gender, ability, religion, sex orientation, immigrant generation status and language*
 - *Policy analysis – includes power dynamics, decision-making processes*
 - *Org culture map- inclusion and connection, direction and purpose, growth and change, autonomy and agency, order and process.*
 - *Findings and planning – hard copies, original data, anonymized transcripts from focus groups.*
 - *Strategic planning*
 - *Leadership, equity, accountability practice training for staff to understand new initiatives*
 - *Can plan in-person retreats – that would be nice! Especially with such sensitive conversations.*
 -
 2. *Implementation – Work Plan*
 -
 -
- III. *Cost*
 1. *Total*
 - *51,547*
 2. *Per employee*
 - *286.38*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Integrative Inquiry LLC
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Cert p. 2
 - Sole proprietor
 - Finaancial strmt
 - 2015-current
 - OA
 - "CHEETA"
 - 2. Subcontractors
 - Claudette N – In Her Precence
 - Sanam Jogami
 - Gengia Hinajosa
 - 3. Organizational Chart
 - Bio/Proj Profile

- II. Proposed Services
 - 1. Services to be Provided
 -
 -
 -
 - 2. Implementation – Work Plan
 - Initial analysis
 - Phase I planning
 - Phase II Implement'n
 - Demographics report
 - DEI Policy analysis
 - Org Culture Map
 - Survey
 - F groups
 - Culture and safety
 - Phase III Findings Planning
 - CC, framing out, strategic planning key ppl, timeline, roles
 - IVV Outcomes clear
 - V Measurable eval
 - VII timeline 8-10 months
 - VIII timeline 8-10 months
 - Trng (methodology/ data/survey document)

- III. Cost
 - 1. Total
 - 51,547
 - 2. Per employee
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Integrative Inquiry LLC
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Specializes in long-term culture change in organizations*
 - *Frequently works on similar projects*
 - *Will develop a comprehensive strategic plan*
 - *Have not worked with state agencies, but have worked with Maine schools and the city of Portland, Acadia national park, Portland Police*
 - *Strong Maine connections*
 - *Public and private sector experience*
 2. *Subcontractors*
 - *Will bring in subcontracting partners as needed*
 - *Claudette Ndayinahaze (In Her Presence*
 - *Sanam Jorjani (Oakland Literacy Coalition)*
 - *Georgie Hinajosa (training and production specialist)*
 3. *Organizational Chart*
 - *Kate Stitham is the sole proprietor but will bring on subcontractors as needed*
 - *Provided financial viability*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Kate will meet with stakeholders and internal leadership*
 - *Then partner with a subcontractor and present to staff and facilitate dialogue*
 - *Will leave us with a concrete plan with a timeline, objectives and RACI chart to determine responsibilities moving forward*
 - *Reference to power dynamics (taking these into account)*
 2. *Implementation – Work Plan*
 - *DEI Demo report (audit of org demographics), DEI policy analysis, org culture map*
 - *Findings and planning (described above)*
- III. *Cost*
 1. *Total*
 - *\$51,547.50*
 2. *Per employee*
 - *\$286.38/180 staff members*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Integrative Inquiry LLC
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *specializes in DEI*
 - *Primary Care Progress*
 1. *projects aimed to improve their internal staff, their curriculum materials, and their training team to make their work more equitable and inclusive.*
 - *Jackson Labs*
 1. *strategic planning and prioritizing goals within Jackson Laboratory*
 - *Goodwill NNE*
 1. *internal equity assessment for their entire company.*
 - *Relevant projects*
 2. *Subcontractors*
 - *Claudette Ndayininahaze - culture broker in intercultural communication, Maine based*
 - *Sanam Joyani – facilitator*
 - *Georgie Hinajosa - production specialist with a learning management background*
 3. *Organizational Chart*
 - *Sole proprietor – experienced facilitator and trainer, DEI*
 4. *Litigation*
 - *None*
 5. *Financial Viability*
 - *Provide balance sheets*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Meet with stakeholders*
 - *DEI Demographic report*
 - *DEI Policy Analysis*
 - *Organizational Culture Map*
 - *Findings and planning*
 - *Surveys and focus groups*
 - *Provided list of deliverables*
 - *Checkin process*
 2. *Implementation – Work Plan*
 - *Provided timeline with key dates and objectives*
- III. *Cost*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

1. Total
 - \$51,547.50
2. Per employee
 - \$286.38

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER NAME: Integrative Inquiry LLC

DATE: 6/14/21

EVALUATOR NAME: *T. Sison*

EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Relevant and diverse experience
- Specific work in municipalities
- Affordable Clientlist

2. Subcontractors

- N/A's however expenses
- cultural practices
- Training + Production Specialist

3. Organizational Chart

- NOT really provided - Sole proprietor.

II. Proposed Services

1. Services to be Provided

- RS-1 listed deliverables and expected expenditures
- Use of consultant and in-house members
- Custom built surveys

2. Implementation - Work Plan

- *ETSP* prepared to not meet structure of dog small town / outside contractor and likelihood of dog w/in timeframe

III. Cost

1. Total

• \$1,547,500

2. Per employee

• 286,388

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Kitamba
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Value lived experience
 - Advocate for voices that are not always represent
 - Lean into discomfort
 - They are doing this DEI work internally as well – important mention
 - 2. Subcontractors
 -
 -
 -
 - 3. Organizational Chart
 - Not much about relevant examples of work
 - Provided financials
- II. Proposed Services to be Provided
 - 1. Services to be Provided
 - Robust stakeholder engagement
 - Will work shoulder to shoulder with Maine DOE
 - What policies most significantly contribute to inequities? – love their perspective, the reality that analysis is essential here.
 - “the rewards- a future where all people belong and are able to thrive” – I appreciate the language
 - Asset based approach to strategic planning – this generates buy in – important to mention!
 - 2. Implementation – Work Plan
 - Included deliverables
 - Internal and external policies review
 - Actionable findings!
 - Lots of mention with collaboration with DEI committee
 -
 -
- III. Cost
 - 1. Total
 - 225,600
 - 2. Per employee
 - 125333

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Kitamba
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - “Co-create…”
 - Focus on schools
 - O View – what we do-
 - Past Columbus, Newark “a,c 240”
 - Balance sheet and Certify of Liability
 - Knows our #of students
 - Knows our efforts so far
 - Become a model
 - 2. Subcontractors
 -
 -
 -
 - 3. Organizational Chart
 - Has

- II. Proposed Services
 - 1. Services to be Provided
 - road map, strategy, hiring equ.
 - 2. Implementation – Work Plan
 - Stakeholder engagement w/in DOE where current left off
 - Analysis 3 phases
 - Asset-based approach to engagement
 - A – Intvs, artifact review, dx findings, logic model
 - review policies, legislation
 - Findings/planning design sessions

III. Cost	
1. Total	• 225,600
2. Per employee	•

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Kitamba
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Social Impact and product development firm
 - Extensive experience with stakeholder engagement, rigorous analysis, continuous improvement and implementation support
 - Committed to improving experiences and outcomes for students
 - School and student-focused
 - On a parallel DEI journey at their own company
 - Work examples not specific to DEI work
 - Could be a leadership model
 2. Subcontractors
 - N/A
 3. Organizational Chart
 - 11 people
 - Does not describe involved staff (or even give their names)
 - Provided balance summary
- II. Proposed Services
 1. Services to be Provided
 - Stakeholder engagement, rigorous analysis, continuous improvement
 - Clearly stated, provided detail
 - Key questions included
 2. Implementation – Work Plan
 - Develop and project mgmt. tools, including milestones and draft implementation plan
 - Engage and interview leadership and critical stakeholders and review existing DEI frameworks and strategies
 - Develop and finalize equity audit scope and sequence, policy review, org structure analysis, analyze data
 - Asset-based approach
- III. Cost
 1. Total
 - \$225,600
 2. Per employee
 - \$1,253.33

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Kitamba
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Founded in 2012*
 - *social impact consulting and product development firm focused on the education sector*
 - *Teach to Lead*
 - 1. *developed a full strategic growth plan*
 - *Future Ready Columbus*
 - 1. *designed a full strategic operating and launch plan*
 - *Newark Public Schools*
 - 1. *align the organization's structure, policies, and practices with its strategic priorities.*
 - 2. *Subcontractors*
 - *None*
 - 3. *Organizational Chart*
 - *Provided chart (not very descriptive of the staff involved)*
 - 4. *Litigation*
 - *None*
 - 5. *Financial Liability*
 - *Provided balance summary*
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - *Stakeholder engagement*
 - 1. *Provided the key questions (these were helpful)*
 - *Analysis*
 - *Continuous Improvement and Implementation Support*
 - *Provided approach to work and mapped timeline*
 - *Listed the deliverables (helpful, esp. the deck reviewing historical trends in hiring, leadership, and compensation)*
 - 2. *Implementation – Work Plan*
 - *Provided timeline with phase, timing, task, and owner (helpful)*
- III. *Cost*
 - 1. *Total*
 - *\$225,600*
 - 2. *Per employee*
 - *\$1,253.33*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Kitamba
DATE: 6/14/21
EVALUATOR NAME: J. Essler
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

HSI?

- Established educational expertise
- Majority - curricula on rural experiences
- Work has reached municipalities and schools, not state

2. Subcontractors

• N/A

3. Organizational Chart

• NO RECORDS

II. Proposed Services

1. Services to be Provided

- Detailed breakdown through phases
- Client needs assessment
- Use the regions on-edges/stakeholder engagement etc.
- detailed
- realistic

2. Implementation - Work Plan

III. Cost

1. Total

• \$225,000

2. Per employee

• \$1,253.33

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Letterman White Consulting LLC
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - OD, DEI, facilitating, public ed,
 - 3 typos in intro
 - Existing strengths and identifying growth opportunities
 - Holistic
 - Current DEI efforts and initiatives – appreciate the recognition
 - Iterative process
 - 2. Subcontractors
 - none
 - 3. Organizational Chart
 - Unwilling to share financial viability – which is a minor informality or irregularity
 - Projects were relevant to the work
- II. Proposed Services
 - 1. Services to be Provided
 - Repetitive
 - typos
 - Consultant facilitated discussion and decision-making process of a workshop design to collaborative explore evaluate
 - Very specific OD workshops – communication differences, effective listening, giving and receiving feedback effectively, collaborate problem solving and decision making, unconscious bias, approaching conflict effectively, group power dynamics...
 - Psychological safety as important in this work!
 - Coaching of leader on delivery, timing, and how to handle resistance
 - Determine DOES compliance with all applicable state and federal laws
 - typo
 - 2. Implementation – Work Plan
- III. Cost
 - 1. Total
 - 115,820
 - 2. Per employee
 - 643

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Letterman White Consulting
DATE: 6/14/21
EVALUATOR NAME: MARY HERRMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - \$ private
 - No license spec
 - Certify ins attached
 2. Subcontractors
 -
 - No
 3. Organizational Chart
 - P. dog ear 3-5 ppl

- II. Proposed Services
 1. Services to be Provided
 - 3 phases A) plng "action rsch roadmap"
 - 8 steps project plan moving forward
 - B) end step 5 implementation forward
 2. Implementation – Work Plan
 - Green Table July-Dec
 - Approve data
 - Check review our policies/law/org ch and processes
 - Tolmer cycle data/
Wk-by-wk
 - C: report/findings/plng for 8 strat action plan/roadmap
 - Dx findings for workshop
 - ME has to monitor tracking

- III. Cost
 1. Total
 - 115,820
 2. Per employee
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Letterman White Consulting LLC
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - Experience in education at all levels
 - Org dev experience
 - Collaborative and Inclusive process
 - Iterative cycles
 - Have done DEI work with state agencies in the past
 - A lot of relevant work in the project examples provided
 - 2. *Subcontractors*
 - N/A
 - 3. *Organizational Chart*
 - Information on individuals AND their role in the project with DOE
 - Refused to provide financials
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - Work collaboratively to effectuate DOE strategic priority
 - Project planning, project implementation, findings and planning, ensure project success
 - Workshops (positive)
 - Psychological safety, noted as important
 - 2. *Implementation – Work Plan*
 - 3 people responsible for implementation
 - Task and outcomes clear
 - 6 month phased process (above)
 - Focus groups and discussions, training and facilitation
 - Data collection and analysis
 - Recommendations
- III. *Cost*
 - 1. *Total*
 - \$115,820.00
 - 2. *Per employee*
 - \$643.44 (per 180 staff)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Letterman White Consulting LLC
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Experienced consulting firm*
 - *Experience in DEI*
 - *Southeast Regional Office of the Department of Developmental Services*
 - 1. *improve this department's culture of equity and inclusion*
 - *Massachusetts Executive Office of Health and Human Services*
 - 1. *create a safe space for conversations about unconscious bias and its impact on the structure, process, and make-up of the agency and how to improve communication skills to be able to create a culture of inclusion and equity*
 - *Massachusetts Commission on the Status of Women*
 - 1. *OD and Action Research project*
 - 2. *Subcontractors*
 - *None*
 - 3. *Organizational Chart*
 - *Provided chart and also information on the individual people and responsibilities (helpful)*
 - 4. *Litigation*
 - *None*
 - 5. *Financial Viability*
 - *Non provided – can provide references*
 - II. *Proposed Services*
 - 1. *Services to be Provided*
 - *Phase A – project planning*
 - 1. *Work with key staff*
 - 2. *Action research*
 - *Phase B – Project Implementation*
 - 1. *Action research (5 and 6)*
 - *Phase C – Findings and Planning*
 - 1. *Action research (7 and 8)*
 - 2. *Determine metrics to monitor and measure progress*
 - 2. *Implementation – Work Plan*
 - *Provided chart that showed the flow of work from Jul to Dec.*
 - *Provided additional information about the weeks, including tasks and outcomes that was helpful*
- III. *Cost*
 - 1. *Total*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

- \$115,820
- 2. *Per employee*
 - \$643.44

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061

RFP TITLE: Equity Audit and Training

BIDDER NAME: Letterman White Consulting LLC

DATE: 6/14/21

EVALUATOR NAME: *Jessica*

EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

refused financials

1. Overview of Organization
 - *Expansions of state government*
 - *explainers of the what-in each example +*
 - *Measured needs in other instances and helped guide to a better place*
2. Subcontractors
 - *N/A*

3. Organizational Chart

- *Only a part will work on - like the breakdown of roles*

II. Proposed Services

1. Services to be Provided
 - *Return research - more breakdowns from desired goal*
 - *power one decision / interests approaches / stakeholders*
2. Implementation
 - *Summary of data colleting PIPs*
 - *trained survey to look at strengths + Policies*
 - *Administrative Support w/ consultant - facilitate discussion*
 - *Interview Power's and communication*
 - *services*
 - *even SMART?*
- III. Cost
 1. Total
 - *\$115,820*
 2. Per employee
 - *\$643,44*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Mindbridge Center
DATE: 6/14/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Implicit bias project –
 - Work with districts
 - Neuroscience based anti-bias resources
 - Work with school officials
 - Experience working with schools and education systems at many levels
 - Experience with Maine systems
 - 2. Subcontractors
 - unclear
 - 3. Organizational Chart
 - Not much info on this

- II. Proposed Services
 - 1. Services to be Provided
 - 5 component process so MEDOE can be central resource for schools to implement racial equity work
 - Component 1 is the only one for the time frame
 - Period 2 starts 1/1/22... this is beyond the timeframe
 - Period 1 work is only half of what the RFP asks for
 - Very detailed sessions – a big time commitment -
 - 2. Implementation – Work Plan

III. Cost

1. Total	• 45,000
2. Per employee	• 250

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Mindbridge Center
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Education Track
 - Implicit Bias project
 - Schools?
 - MICC Acts of A
 - Neuroscience
 - Has legal, financial, insurance, B 105
 - Other projects York Me, Auburn, EOC
 - Balloon staff
 - 2. Subcontractors
 - no
 -
 -
 - 3. Organizational Chart
 - yes
- II. Proposed Services
 - 1. Services to be Provided
 - DOE and central resource
 - Critical guide
 - 2. Implementation – Work Plan
 - 7/1-12/31
 - Intro sessions – exec and dept staff
 - Landscape & Opp analysis
 - 5 parts
 - Mapping
 - Survey
 - Docs & stats review
 - Practice checklist
 - Listening
 - LOA summary & recs
 - 1/22-12/31/22
 - Equity implementation plan
 - Internal training sessions
 - Assessment
- III. Cost
 - 1. Total
 - 45000
 - 2. Per employee

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Mindbridge Center
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - *Implicit Bias Project*
 - *Talks about the neurobiology of implicit bias*
 - *Seems to address an equity audit for schools more than state agencies*
 - *Co-development*
 - *Uses a scientific approach began in 2018*
 - *Has worked with local school districts, understands the systems*
 - *Has worked with EDC*
 - 2. Subcontractors
 - *N/A*
 - 3. Organizational Chart
 - *Team of 6 qualified people*
 - *+ others*
 - *Org chart is a little confusing*
- II. Proposed Services to be Provided
 - 1. Services to be Provided
 - *DEIA (diversity equity inclusion and anti-racism)*
 - *5-component process (but only 1-2 within the timeline we requested)*
 - *Executive Session (who does this include), DOE mini retreat*
 - *Same as below?*
 - 2. Implementation – Work Plan
 - *Executive Session, stakeholder mapping, baseline services*
 - *DEIA checklist*
 - *Summary and recommendations*
- III. Cost
 - 1. Total
 - *\$45,000*
 - 2. Per employee
 - *\$250 (180 staff members)*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Mindbridge Center
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Had information this section that was better suited for the proposal section*
 - *Experience in education*
 - *Established in 2018*
 - *DEI work*
 - *York Middle School*
 - 1. *9-month project on implicit bias, bias mitigation, and anti-racist practice*
 - *Auburn School District*
 - 1. *Originally school-based biased events*
 - 2. *Larger city-wide efforts*
 - *Education Development Center*
 - 1. *Six-month seminar series*
 - *Provided nice detail on all the projects and the projects were relevant to work needed under the RFP*
 - 2. *Subcontractors*
 - *?*
 - 3. *Organizational Chart*
 - *Provided a chart but it did not provide much detail*
 - 4. *Litigation*
 - *?*
 - *?*
 - 5. *Financial Viability*
 - *Provided financial information*
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - *5 component process – DOE to become central resource and guide for schools*
 - *Broke the work into periods with components*
 - *The components provided helpful details of what it would consist and contained helpful details such as example discussion questions*
 - 2. *Implementation – Work Plan*
 - *Work plan was included throughout proposal.*
 - *Extends beyond 2021*

III. *Cost*

1. <i>Total</i>	• <i>\$45,000</i>
2. <i>Per employee</i>	

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

- \$250

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Mindbridge Center
DATE: 6/14/21
EVALUATOR NAME: J. SSI
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 2018 only few years old MAP + Services given
- works a lot w/ schools, various system
- Main + worked w/ government
- Did not define but Stephen Abbott is external

2. Subcontractors

3. Organizational Chart

- unclear if all are working in project

II. Proposed Services

1. Services to be Provided

- Will the report?
- Is being COA what we are asking for?
- They do not plan to meet + include
- really seem after the external/schools
- Internal being seen late in process and assessments?

2. Implementation - Work Plan

III. Cost

- 1. Total • \$95000
- 2. Per employee • \$250

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Phase Consulting Partners
DATE: 6/22/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Unrelated work with 3 examples
 - Not tailored to DOE
 2. Subcontractors
 3. Organizational Chart
 - Did not provide financials

- II. Proposed Services
 1. Services to be Provided
 - Group exercises, simulation
 - Equality of treatment – not sure that's our goal?
 - Many typos
 2. Implementation – Work Plan
 - Broken down into 4 quarters... this is only July-dec?

- III. Cost
 1. Total
 - 148,550
 2. Per employee
 - 825

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Phase Consulting Partners
DATE: 6/14/21
EVALUATOR NAME: MARY HERRMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Storytelling
 - “County Employees”
 - More on “course” training: corporate and county
 - Has legal
 - NBA/Miami Heat
 - County – Miami data biz
 - 2. Subcontractors
 -
 - 3. Organizational Chart
 - yes
- II. Proposed Services
 - 1. Services to be Provided
 - Excellent o/view
 - Relatability
 - 2. Implementation – Work Plan
 - Individual & Group interviews
 - Hands on interactive
 - “course”
 - 360 assessment
- III. Cost
 - 1. Total
 - 64,800
 - 2. Per employee
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Phase Consulting Partners
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Specializes in strategic consulting and program mgmt.*
 - *Minority business*
 - *Miami headquarters*
 - *Project with NASA not DEI related*
 - *Miami Heat and Intuitive Surgical were about project portfolio and mgmt. software implementation*
 2. *Subcontractors*
 - *N/A*
 -
 3. *Organizational Chart*
 - *5 people*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Confusing mention of how social media is used to tell and validate stories*
 - *Building upon inner/personal strengths through stories*
 - *Common concerns will be identified*
 - *Proposed services more of a philosophical statement than an actual plan*
 2. *Implementation – Work Plan*
 - *Pre-assessment activities, exec. Leadership meeting, analysis and result reporting, develop strategic plan for DEI, develop DEI materials (unclear), leadership training, train the trainer model, program implementation, establish metrics, marketing mgmt., metrics review, staff introduction to DEI plan, assign a DEI committee (we have one), implement and consult...*
 -
- III. *Cost*
 1. *Total*
 - *\$148,550.00*
 2. *Per employee*
 - *\$825/180 staff*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Phase Consulting Partners
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *A strategic consulting, program management, and training company*
 - *National and international work*
 - *NASA*
 - 1. *Training on Microsoft*
 - *Miami Heat*
 - 1. *Project Portfolio Mgmt. Software New Implementation, License & Support contract*
 - *Intuitive Surgical*
 - 1. *Project Portfolio Mgmt. Software New Implementation, License & Support contract*
 - *Projects not related to work in RFP*
 - 2. *Subcontractors*
 - *?*
 - 3. *Organizational Chart*
 - *Provided but did not contain much information*
 - 4. *Litigation*
 - *None*
 - 5. *Financial Viability*
 - *None*
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - *Use of social media – poll and interview*
 - *Identify common concerns and challenges*
 - *Review and analyze*
 - *Targeted milestones*
 - *Rubric based objectives and criteria*
 - *Did not seem tailored to needs or environment of the Department*
 - *Implementation – Work Plan*
 - *Provided a workplan, but did not have much information*
- III. *Cost*
 - 1. *Total*
 - *\$148,550*
 - 2. *Per employee*
 - *\$825*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Phase Consulting Partners
DATE: 6/14/21
EVALUATOR NAME: *T. Syca*
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Does not follow the format?
 - Sounds like a course on social media?
 - Does not feel like they read proposal
 2. Subcontractors
 - UNKNOWN
 3. Organizational Chart
 - NOT sure roles of many

- II. Proposed Services
 1. Services to be Provided
 - course of slides, interviews
 - NOT sure what looks for!
 2. Implementation - Work Plan
 - vague and not very specific to ask
 - Don't know who is doing this

- III. Cost
 1. Total
 - 148550
 2. Per employee
 - 895

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Public Consulting Group
DATE: 6/22/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Employs over 3k ppl
 - Multidisciplinary approach – solutions that matter
 - Worked with many school districts on equity audits before
 - Federal compliance monitoring- not as directly related
 - 2. Subcontractors
 - Blackprint education consulting
 - 3. Organizational Chart
 - So many PhDs
 - Amanda Preston
 - Lots of current litigation
 - Provided financial statements

- II. Proposed Services
 - 1. Services to be Provided
 - Flexible virtual presentation timing
 - Includes research and practice literature review
 - Agreed upon metrics of success
 - Includes deliverables
 - Concise, to the point application
 - Provides the how in process with questions regarding
 - Nothing stands out, not Maine specific, generic

- III. Cost
 - 1. Total
 - 129,000
 - 2. Per employee
 - 716

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Public Consulting Group
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - AL xz
 - School Dxs
 - OR, MA, CALA
 - DE, NH, FLA
 - 2. Subcontractors
 - ? Insurance & Licensure
 - 3. Organizational Chart
 - Yes
 - Resumes
- II. Proposed Services
 - 1. Services to be Provided
 - A. Project planning
 - planning
 - Virtual position 60'
 - B. Implem'n
 - Data
 - Intvs
 - Focus G
 - Survey
 - Data Docs
 - \$ Resc Distribution
 - Recruitment
 - RSCH & Prax grounded
 - C. Findings Planning
 - Implementation – Work Plan
 - P. 4 Chart
- III. Cost
 - 1. Total
 - 129,000
 - 2. Per employee
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Public Consulting Group
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - Have done a lot of work with school districts and less with State agencies
 - A lot of their experience with districts is NOT related to DEI work
 - Enormous company with multiple interests
 - Have worked with schools and SEAs
 - Used courageous conversations about race project
 2. *Subcontractors*
 - BlackPrint Education Consulting
 -
 3. *Organizational Chart*
 - Not a huge team, but huge corporation bias included
 - Resumes for team members included, many educators, PhD's, roles and responsibilities included
 - Litigation included – not meeting timelines and not delivering on contract deliverables
- II. *Proposed Services*
 1. *Services to be Provided*
 - Survey DOE staff, review of data and documents
 - Analysis of resource distribution
 - Recruiting and retaining a diverse workforce
 - Findings and planning
 - 3-day action planning workshop
 2. *Implementation – Work Plan*
 - 5-6 month plan July-December 2021
 - Who does the kick off meeting happen with?
 - Why review policies in other Maine agencies?
 - Recommendations and final roadmap
 - In-person meetings upon request
- III. *Cost*
 1. *Total*
 - \$129,000.00
 2. *Per employee*
 - \$716.87 (per DOE employee at 180 staff)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Public Consulting Group
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - Large organization
 - Experience in education and audit
 - 1. Provided a number of projects that demonstrate audit experience and DEI experience
 - Alabama Dept of Examiners – operational student and analysis of Alabama DOE
 - Sharon Public Schools – special education review
 - Broward County Public Schools – professional learning; race equity program
 - 2. *Subcontractors*
 - BlackPrint Education Consulting – significant education experience
 - 3. *Organizational Chart*
 - Provided org chart and proposed project team. Included role and education and professional background (helpful)
 - Included team member bios
 - 4. *Litigation*
 - Provided list of litigation
 - 5. *Financial viability*
 - Provided audited financial statements
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - First month – Planning, presentation to all staff (60 min, virtual)
 - Phase B – Project implementation (interviews, focus groups, survey, data documents (secure drop box), financial resource distribution (including ESSR and other federal funds), recruitment and retention – provided some questions that could be looked at (helpful), research and practice literature,
 - Phase C – Finding and planning (3 days action planning sessions)
 - 2. *Implementation – Work Plan*
 - Provided clear chart on the work activities and deliverables and a timeline
- III. *Cost*
 - 1. *Total*
 - \$129,000
 - 2. *Per employee*
 - \$716.67

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Public Consulting Group
DATE: 6/14/21
EVALUATOR NAME: *Jessica*
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - 31 million worth but seems all in works not finished
 - Worked w/ other state education entities
 - Worked w/ public schools
 2. Subcontractors
 - Blackprint Ed Consult → work of schools & Mass ~~ED~~
 - Strategic Matter exp.
 3. Organizational Chart
 - Disruptive and comprehensive of role & Ed. Background

- II. Proposed Services
 1. Services to be Provided
 - Survey for stakeholders involvement
 - Data, reports etc.
 - Assessment & verification
 2. Implementation - Work Plan
 - within five week, doesn't address who oversees each 50 hard to know if *withstander*

- III. Cost
 1. Total
• \$129,000
 2. Per employee
• \$716,107

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Rethinc
DATE: 6/22/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Common mission to end systemic racism
 - Created to shatter common misconceptions about EI
 - Respect, vulnerability, and learning – it's safe to not know what to do next, mistakes can be repaired
 - Interracial consulting group focused on equity adult learning and deconstruction of inequity in public and private sectors
 - Redundant intro
 2. Subcontractors
 - Many contractors – great bios – genuine, real, not just about their on paper qualifications
 - Recognizing “on the land of the Piscataway nation”
 3. Organizational Chart
 - No litigation
 - Financial statement
- II. Proposed Services
 1. Services to be Provided
 - Phase 1: includes learning about current efforts, foster spaces for safety and care
 - Lots of focus on DEI committee work/partnership – how much of a time commitment will this be for our volunteers?
 - Lens of racism, equity, diversity, inclusion, WELLNESS, and belonging
 - PD during this time
 2. Implementation – Work Plan
 - Krownapple’s work – did their research
 - Included deliverables
 - Not clear the who for each activity
- III. Cost
 1. Total
 - 257,600
 2. Per employee
 - 1431

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Rethinc
DATE: 6/14/21
EVALUATOR NAME: MARY HERMON
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Established 2021*
 - *Muslim [experienced] Ex D.*
 - *5x Racism*
 - *Wellness Nature*
 - *Ed Tech Co. MA: Friere Schools PA*
 - *Included financials and licensures with staff*
 2. *Subcontractors*
 - *Subs listed*
 - *PA, MI, MS, NJ*
 3. *Organizational Chart*
 - *yes*

- II. *Proposed Services*
 1. *Services to be Provided*
 - *Prep'n or plng mtg*
 - *Interviews*
 - *DEI Chairs*
 - *Rsch Eq Audit Project plan*
 - *Share*
 2. *Implementation – Work Plan*
 - *Prep'n*
 - *Conduct Audit, Analyze, Shore map measure and see timeline*
- III. *Cost*
 1. *Total*
 - *257,000*
 2. *Per employee*
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Rethinc
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - Co-founders are women, BIPOC
 - Brand new company
 - “do the work while continuing to work” approach
 - Anti-racist work in a PA charter school
 - Experienced team
 - Presented in an aware way
 - Safety (mistakes in the process are acceptable)
 - Understanding of adult learning
 - Included land-recognition
 2. *Subcontractors*
 - 9 subcontractors!
 3. *Organizational Chart*
 - 5 experienced people
 - Not a ton of information about the team members (more information about the subcontractors)
- II. *Proposed Services*
 1. *Services to be Provided*
 - Support and leverage work that has already been done
 - Use DEI and Commissioner’s Office team
 - Planning team set up with DEI leads and CO staff, conduct interviews, equity audit project plan
 - Critical analysis and equity audit
 - Foster spaces for safety
 - How does volunteer time with DEI work? They reference this a lot
 - PD throughout the process, not only at the end
 - Focus on human capital
 - July-December
 - Interviews, surveys, analysis
 - Detailed workplan but unclear WHO would be doing what (on their team and among the subcontractors)
 2. *Implementation – Work Plan*

III. Cost

1. Total	• \$257,600.00
2. Per employee	

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

- \$1,431.11 (per employee at 180 staff members)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Rethinc
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - Formed in 2021 as outgrowth of previous organization (Just Instruction)
 - Focus on DEI
 - Curriculum Associates
 - 1. Multiple work projects including: Development of an organization-specific anti-racist rubric
 - Freire Schools
 - 1. Multi-year work
 - Did not provide 3rd project
 - Development of an organization-specific anti-racist rubric
 - 2. *Subcontractors*
 - Provided list of the subcontractors and their background experience
 - 3. *Organizational Chart*
 - Provide but not much information
 - 4. *Litigation*
 - None
 - 5. *Financial Viability*
 - provided
- II. *Proposed Services*
 - 1. *Services to be Provided*
 - Phase 1: *Preparing for audit, finding, and roadmap*
 - 1. *Cadre of DEI champions*
 - 2. *Four steps (initial planning, interviews/focus groups, DEI committee, share research)*
 - Phase 2: *Conduct Equity Audit*
 - 1. *Focus on human capital and talent*
 - Phase 3: *Analyze, share and map*
 - *Measurements and deliverables*
 - 2. *Implementation – Work Plan*
 - *Provided a detailed workplan with phases and timeline, descriptions. (helpful)*
- III. *Cost*
 - 1. *Total*
 - \$257,600
 - 2. *Per employee*
 - \$1431.11

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Rethinc
DATE: 6/14/21
EVALUATOR NAME: Jessica
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization knows a profpt. pg 24
 - Travel not company
 - Roles of curriculum + operations
 - Details only?
 2. Subcontractors various listed
 - Q?
 - Variety of experiences + interactions w/ Education
 3. Organizational Chart not sure what role for this project
- II. There are some contractors for people not listed on previous pgs
 1. Services to be Provided would have liked more specific delineated team broad
 - ~~board support~~
 - Collaborative and mixed workforce
 - Focus on human capital + funds
 2. Implementation - Work Plan not clear which subcontractors we rely on
 - Not clear which subcontractors we rely on
 - Would like to know how many interviews focus groups etc. lots of "could" would like more definitive approach but see collaborative possibility
- III. Cost
 1. Total \$257,600
 2. Per employee \$1431.11

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Tangible Development
DATE: 6/22/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Focus on city – copied from another app?
 - Quoted kendi
 - No DOEs on their list of previous work
 - Only 2 projects listed
 - Have done equity audits
 2. Subcontractors
 - none
 3. Organizational Chart
 - Financial docs

- II. Proposed Services
 1. Services to be Provided
 - Leadership readiness sessions – futuring exercises
 - Climate survey
 - focus groups – identity based
 - benchmarking against national best practices
 - visioning
 - SWOT analysis
 - Wanted to develop DEI statement, which we already have
 - Seems to be a lot of work for the dept
 - Implementation – Work Plan
 - Estimated 12 months
 -
 2. Implementation – Work Plan
 -

- III. Cost
 1. Total
 - 91,650
 - Not including travel expenses
 - Reproduction of any materials is expressly forbidden without specific approval?
 2. Per employee
 - 509

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Tangible Development
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. **Organization Qualifications and Experience**
 - 1. **Overview of Organization**
 - City Government mentions
 - Minority owned +
 - Financials and certificate included
 - 2. **Subcontractors**
 - no
 - 3. **Organizational Chart**
 - Yes and bios

- II. **Proposed Services**
 - 1. **Services to be Provided**
 - Access readiness, SWOT, leadership readiness survey incl Q
 - Sessions and climate survey for groups
 - Diversity audit
 - Communications audit
 - SWOT
 - Report rec DEI Group
 - Capacity blding purpose strat
 - 2. **Implementation – Work Plan**
 - 1& strategy update and development, 4 month training and visioning program.
 - 3. **Plan for 6 month communications plan**
 - Work is 12 months

III. **Cost**

1. Total	• 57,650
2. Per employee	•

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Tangible Development
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Expertise, specifically in DEI work and anti-racism*
 - *Change strategy, culture transformation, learning and development*
 - *Have not worked with state agencies, but have worked with school districts*
 - *“the city” mentioned – unclear what that means but*
 2. *Subcontractors*
 - *N/A*
 -
 3. *Organizational Chart*
 - *10 people*
 - *Financial statements included*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Phase I, assessment, readiness, alignment – survey, sessions, focus groups*
 - *Phase II – strategy development, visioning ... develop equity statement (we already have that, they should know)*
 - *Phase III – learning and development*
 2. *Implementation – Work Plan*
 - *Phase I (6 months), Phase II (4 months) Phase III (6 months)*
 - *Over a year long project! Others are 5-6 months*
 - *Want to own the workplan (no)*
 - *Require half pay upfront (not allowed in SOM procurement)*
- III. *Cost*
 1. *Total*
 - *\$91,650.00 (has terms and conditions)*
 2. *Per employee*
 - *\$509.17*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Tangible Development
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Consulting firm*
 - *Focus on DEI*
 - *Work across sectors and industries*
 - *City of Happy Valley*
 1. *Diversity audit, climate assessment, and strategic diversity planning*
 - *Capital Region BOCES*
 1. *Diversity audit*
 - *Relevant projects, but only 2 listed.*
 2. *Subcontractors*
 - *None*
 3. *Organizational Chart*
 - *Provided organization chart and the resumes of the staff.*
 - *Demonstrated relevant experience*
 - *Experienced team*
 4. *Litigation*
 - *None*
 5. *Financial Viability*
 - *Provided*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Phase I – Assessment, Readiness, and Alignment - Provides estimated times and formats*
 1. *Leadership readiness (survey and sessions)*
 2. *Assessment*
 - a. *Climate assessment (survey, focus groups)*
 - b. *Diversity Audit*
 - c. *Internal/external communications audit*
 - d. *SWOT analysis*
 3. *DEI Committee Capacity Building Training*
 4. *Virtual Facilitation Model*
 5. *Includes the deliverables*
 - *Phase II – Strategy Development Phase*
 1. *Visioning (facilitate organizational alignment, brainstorming sessions, equity statement)*
 2. *Includes the deliverables*
 - *Phase III – Learning and Development*
 1. *Education and training program*
 2. *Includes the deliverables*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

- Stresses communication
- 2. Implementation – Work Plan
 - Includes proposed timeline and milestones

III.	Cost	
	1. Total	• \$91,650
	2. Per employee	• \$509,17

Note: includes terms and conditions for cost, including an upfront payment. This would need to be discussed during contract negotiations. The Department cannot pay for services up front.

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Tangible Development
DATE: 6/14/21
EVALUATOR NAME: *A. Ross*
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

"11.14"

I. Organization Qualifications and Experience

1. Overview of Organization

- *Organization / Multi Sector*
- *Partners of Public / Non Profit + Public*
- *Partners on DEI*

*2 Eq. Products for a lot of
1. multiple not
start
resurrection*

2. Subcontractors

- *NONE - questions Green College - SCE 1*

3. Organizational Chart

- *Partners have varied experiences and specific DEI roles*

II. Proposed Services

1. Services to be Provided

- *Partnership readiness*
- *Market Survey + Focus groups*
- *Programs + measure*

*really like their various formats
no records
Brevity of delivery
x 1/2 a lot of
asking need a year*

2. Implementation - Work Plan

12 months

III. Cost

1. Total *\$ 91,650*

2. Per employee

\$ 509,17

*12/20/21
12/20/21*

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: UPD Consulting
DATE: 6/22/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Black-owned public sector management consulting firm, services to states and schools
 - IDI assessments
 - Illinois board of higher education
 - 2. Subcontractors
 - Valrun consulting group
 - 1-on 1 coaching
 - 3. Organizational Chart
 - Facilitative leadership for social change
 - Organizational Chart
 - Clear but not much info on roles
 - No litigation
- II. Proposed Services
 - 1. Services to be Provided
 - Systems of oppression and systems of advantage
 - “an organization is perfectly designed to get the results it gets”
 - Assessment to awareness to planning to implementation to improvement – so important to include the awareness!!!
 - Video presentation of results
 - IDI
- III. Cost
 - 1. Total
 - 250,000
 - 2. Per employee
 - 1389

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: UPD Consulting
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Minorly owned, or own organization firm culture +
 - Vancouver Public Schools
 - Illinois Bd Higher Ed
 - San Diego County
 - Facilitated leadership for social theory of action
 - Working capital, balance sheets and insurance
 2. Subcontractors
 - Valb run TVCG consulting and intercuture development inventory - IDI
 -
 3. Organizational Chart
 - yes
- II. Proposed Services
 1. Services to be Provided
 - IDI
 - Doc review
 - Focus groups
 - Round table
 - Affinity survey
 - Voices of all
 2. Implementation – Work Plan
 - 0 Kick off
 - 1-6 Delivery
 - Data/Quant
 - Doc rev
 - Inter Dve SMART
 - Inventory IDI
 - Staff coaching
 - Qualitative and Data surveys and focus groups 30-40
 - Leadership Interviews
 - Equity strategy and implementations
 - Report and Rec
 - Time line chart - Dec
- III. Cost
 1. Total
 - 250,000
 2. Per employee

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: UPD Consulting
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Black-owned*
 - *Focus on performance mgmt., change mgmt., implementation assistance*
 - *Expertise in organizational change but not necessarily the specific topic that we're looking for*
 - *Highly qualified with relevant experience*
 2. *Subcontractors*
 - *Valburn Consulting Group (intercultural development inventory)*
 - *Have the DEI experience that UPD doesn't*
 - *Experience with facilitated leadership for social change*
 3. *Organizational Chart*
 - *Big org chart, many people*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Phases 0-6*
 - *Key questions*
 - *"Awareness" – understanding of our need to change*
 - *Taking a pulse, identifying project champions, quantitative data analysis, document review and analysis, Intercultural Development Inventory (IDI) staff assessment and coaching, qualitative data analysis (with focus groups), equity strategy and implementation planning, report of findings and recommendations*
 - *RACI concept*
 - *Extreme personal attention (30 minute individual sessions)*
 2. *Implementation – Work Plan*
 - *See notes above*
- III. *Cost*

**they also provide a cost breakdown of the various activities that they propose so maybe we could customize what they're offering and bring down the cost?*

 1. *Total*
 - *\$250,000*
 2. *Per employee*
 - *\$1,389 (per staff for 180)*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: UPD Consulting
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Management consulting firm*
 - *State and local government experience*
 - *Formed in 2006*
 - *Vancouver Public Schools*
 1. *Educational equity audit*
 - *Illinois Board of Higher Education*
 1. *Technical assistance for new advisory council, stakeholder engagement, and facilitate development of equity-focused statewide plan for higher education*
 - *County of San Diego*
 1. *New Office of Equity and Racial Justice*
 - *Projects demonstrated relevant experience*
 2. *Subcontractors*
 - *The Valbrun Consulting Group (view as partnership) – will lead the intercultural development inventory and one-on-one coaching, equity specialists*
 3. *Organizational Chart*
 - *Provided charts including consultant pool*
 - *Additional biographical or role information would have been beneficial*
 4. *Litigation*
 - *None*
 5. *Financial Viability*
 - *Provided balance sheets*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Looks at key questions*
 1. *Assessment – where are we now*
 2. *Awareness – Do we share an understanding*
 3. *Planning – What different work must we do to change outcomes?*
 4. *Implementation – how do we manage change and make that change stick?*
 5. *Improvement – How do we ensure ongoing feedback and adjustment*
 - *Six work delivery phases – provides details and timframes for all*
 1. *Phase 0 : project kick-off*
 2. *Phase 1 : Quantitative Data Analysis*
 - a. *All DOE employees*
 3. *Phase 2: Document Review and Analysis*
 4. *IDI staff Assessment and coaching*
 - a. *50 item questionnaire*

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

- b. *Group aggregate session*
 - c. *Includes outcomes (helpful)*
 - *Phase 4 Qualitative data analysis*
 - 1. *Surveys, focus groups (tenure cohorts), leadership interviews, a. Explains what will get from interviews (helpful)*
 - 2. *Equity strategy and implementation planning*
 - a. *SMART goals*
 - b. *Work with project champions*
 - c. *Contained sample chart (helpful)*
 - *Phase 6 report of finding and recommendations*
2. *Implementation – Work Plan*
- *Included timeline chart of all project tasks that were outlined in proposal*

III.	Cost
	1. Total
	• \$250,000
	2. Per employee
	• \$1389

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: UPD Consulting
DATE: 6/14/21
EVALUATOR NAME: Jessica
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization
 - Established, 2006 - certified Minority Owned D-Status
 - Speaks Spanish in Puerto Rico and work
 - Knows the region and gov's + helped
2. Subcontractors
 - NCC - Volunteered consultancy
 - Antiracism development inventory
 - Consultancy model
3. Organizational Chart
 - Freelance team for projects

II. Proposed Services

1. Services to be Provided
 - Management Consultants! (RFP)
 - Used RFP
 - Multi-Phase work - small workgroups/Leadership Initiatives
2. Implementation - Work Plan
 - Very detailed schedule
 - She has the RFP for some observations

III. Cost

1. Total	\$250,000	did not follow form
2. Per employee	\$1388.89	

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: WestEd
DATE: 6/22/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Sig exp with DOE's on this work
 - Current Litigation
 2. Subcontractors
 - none
 3. Organizational Chart
 -

- II. Proposed Services
 1. Services to be Provided
 - Culturally responsive pedagogy
 - I would love to take the time to read all of this... but hundreds of pages for one application? What is their report going to look like?
 - Adult learning theory
 - Community agreements – appreciate that
 - Seems to be more focused on schools and districts than state agencies
 - A lot of work for staff
 2. Implementation – Work Plan
 -
 -

- III. Cost
 1. Total
 - 334,705
 2. Per employee
 - 1859

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: WestEd
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - A lot on schools and students
 - 5 Focus areas page 2
 - Did homework on demographics ESSA dashboard per 2018-2019 absence 2019-20 (DOE)
 - Experience TACs/Comp Ctrs
 - NCSI 7 y – ME Spec Ed
 - CDS
 - TIFC
 - WAM/MA/DE
 2. Subcontractors
 - no
 -
 -
 3. Organizational Chart
 - Yes large organization 139ppi; 700 ppl total
- II. Proposed Services
 1. Services to be Provided
 - Internal equity audit
 - Analysis strategic plan & PD
 - Roadmap for impvtt
 - Teachers
 - Engagement strategies
 - Reading Tasks
 - 3 phases 5 months.
 2. Implementation – Work Plan
 - Roadmap for input
 - Timeline p. 7
 - Report p. 15
 - Phase II T findings and report
- III. Cost
 1. Total
 -
 2. Per employee
 -

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: WestEd
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Experience leading National TA Centers (Region 2, 13, 15 and a subcontractor for Region 7 and 14)
 - US ED – Center to Improve Social Emotional Learning and School Safety, and National Center for Systemic Improvement
 - Worked with Maine DOE (CDS) and other special services and also the Maine Teacher Incentive Fund
 - Has both national and local experience
 2. Subcontractors
 - None that were noted in RFP
 3. Organizational Chart
 - Included
 - Large organization
 - Project staff bios included
 - 50 pages of financial documents included
 - Have current litigation
- II. Proposed Services
 1. Services to be Provided
 - “Audit”
 - Culturally responsive pedagogy – talks a lot about what this means for teachers and less for DOE staff. This is an assets-based approach rather than a deficit-based approach – like that
 - CRP talks a lot about what this means for teachers and students (developmentally) but we need a deep focus on our internal department
 - School specific (not enough focus of state government agency)
 - Self-identified affinity groups
 2. Implementation – Work Plan
 - Three phases over a five-month period facilitated by a cross-racial team
 - “education leaders” and staff at DOE
 - Talks about using the DEI Committee – not sure how that works since this is a voluntary committee
 - Phase1-developing a project plan and foundational training for the state equity team (who is on the state equity team?), Phase 2-data collection and analysis, Phase 3-final report and plan
 - Surveys for staff, policy research, organizational research, analysis of staff sense of belonging and inclusion, salary and benefits analysis
- III. Cost

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

1. Total
 - \$334,705.00
2. Per employee
\$1,859.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: WestEd
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. *Organization Qualifications and Experience*
 1. *Overview of Organization*
 - *Educational research, development, and service organization*
 - *Large organization*
 - *Noted the state's population makeup, and provide Maine numbers*
 - *DEI experience*
 - *Experience with MDOE (TIF)*
 - *Washington Office of Superintendent of Public Instruction – equity audit*
 - *MA Dept of Elementary and Secondary Education – Strategic planning for building racially diverse and culturally responsive teacher workforce*
 - *Delaware Dept of Education – diversify teacher workforce and implement culturally responsive practices*
 2. *Subcontractors*
 -
 3. *Organizational Chart*
 - *Provided and included staff bios*
 - *Experienced team*
 4. *Litigation*
 - *Provided*
 5. *Financial Viability*
 - *Provided audited financial statements*
- II. *Proposed Services*
 1. *Services to be Provided*
 - *Culturally responsive pedagogy – a lot of information about school environment, academic achievement, etc*
 - *Three phases*
 1. *Develop a project plan and provide training*
 2. *Implementation of plan, data collection, and data workbooks*
 3. *Creation of equity goals to be monitored over time and ongoing training opportunities, final report*
 - *Four three-hour sessions to develop state's equity team's capacity*
 - *Implementation – policy research, individual staff survey, organization research and trend review*
 1. *Focus groups based on role group and self-identified affinity groups*
 2. *Analysis of staff sense of inclusion and belonging*
 3. *Interview with DOE human resources staff*
 4. *Analysis of salary and benefits*
 - *Findings and planning – working sessions*
 2. *Implementation – Work Plan*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

- *Provided chart with phase, task, and month*
-

III. Cost

1. Total
 - \$334,000
2. Per employee
 - \$1859

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Wested
DATE: 6/14/21
EVALUATOR NAME: JESSICA
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

1st system

I. Organization Qualifications and Experience

1. Overview of Organization

• Break down of regional network & data. 4p.

• Website of Department

2. Subcontractors

• ?

• ?

3. Organizational Chart

• Larger org + valuable staff
years of

II. Proposed Services

1. Services to be Provided

• Multiple responsive packages (RFP)

• Focus on direct staff to field

2. Implementation - Work Plan

• Does not indicate who will do each task

• Multiple RFPs always + reward

like both seasons

III. Cost

1. Total

• 334,705
• \$1859

2. Per employee

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Zlio International Group
DATE: 6/22/21
EVALUATOR NAME: Amelia Lyons
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Woman owned and operated management consulting firm
 - After work in wall street
 - Executive coaching, DEI, strategic implementation
 - No litigation
 - Did not disclose financial documents
 - 1 person with owner
 - Did not provide any projects examples
 - 2. Subcontractors
 - none
 - 3. Organizational Chart
 - Not much detail on roles/responsibilities/experience

- II. Proposed Services to be Provided
 - 1. Services to be Provided
 - Org research including historical trend reviews
 - Kind of vague with unnecessary details – report will be broken down into sections to make info clearer and more concise. Report will include charts and tables....

- III. Cost
 - 1. Total
 - 35,000
 - 2. Per employee
 - 194

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Zlio International Group
DATE: 6/14/21
EVALUATOR NAME: MARY HERMAN
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Hard to read – fax?
 - Minorly owned +
 - Cert/Insurance
 - 2. Subcontractors
 -
 -
 - 3. Organizational Chart
 -

- II. Proposed Services
 - 1. Services to be Provided
 -
 -
 -
 - 2. Implementation – Work Plan
 - A. Planning intvs focusing open communication,
 - B. Policy research for str and mst and barriers
 - Staff survey
 - Org'l Rsch hx trends (audit)
 - Hiring opportunity promotion and procurement
 - Culture – choices/effort/res aps
 - C. Findings/Planning – current/goals/implement strat plan & timeline & performance timeliness. July-Dec, 6 months.

III. Cost	
1. Total	• 35,000
2. Per employee	•

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Zilo International Group LLC
DATE: 6/14/21
EVALUATOR NAME: Page Nichols
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Woman owned and operated consulting firm
 - 2 people
 - Over 40 years of experience coaching and consulting organizations
 - No projects provided to show any of their past experience
 - *does not disclose financial records!
 - Statements without evidence
 2. Subcontractors
 - N/A
 -
 3. Organizational Chart
 - Milena Zilo (project executive)
 - Maurice Brown (lead consultant on the project)
 - Not much information about them (no bio) some information in the cover letter
- II. Proposed Services
 1. Services to be Provided
 - Will approach planning based on DOE needs as they become more clear
 - Will work with key staff and stakeholders
 - Once a plan is developed, it will be presented to DOE before moving forward with implementation
 - Charts and tables...? Missing information
 - Implementation – Work Plan
 - Policy research
 - Staff survey
 - Org research including historical trends
 - Findings and planning (overall analysis of how to implement change based on data collected during audit.
 2. Implementation – Work Plan
- III. Cost
 1. Total
 - \$35,000
 2. Per employee
 - \$194/180 staff members

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Zlio
DATE: 6/22/21
EVALUATOR NAME: Jennifer Tarr
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Consulting firm founded in 2014
 - Done work nationwide
 - Team has people with DEI experience
 - Did not provide any projects?
 - 2. Subcontractors
 - None
 - 3. Organizational Chart
 - Provided chart for this project (2 people)
 - 4. Litigation
 - None
 - 5. Financial Viability
 - Did not provide

- II. Proposed Services
 - 1. Services to be Provided
 - Phase A: Planning
 - 1. Presentation on project
 - Phase B: Project Implementation
 - 1. Policy research
 - 2. Staff survey
 - 3. Organization research
 - a. Including procurement and contracting
 - Phase C: Findings and Planning
 - 1. Begin prep work for final report
 - 2. Implementation – Work Plan
 - Provided a chart with phase, month, and work

- III. Cost
 - 1. Total
 - \$35,000
 - 2. Per employee
 - \$194.44

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202104061
RFP TITLE: Equity Audit and Training
BIDDER NAME: Zilo International
DATE: 6/14/21
EVALUATOR NAME: *Wagon*
EVALUATOR DEPARTMENT: Department of Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Established comp + grad deal of history
 - Will not disclose records
 - No PR reports shared
 2. Subcontractors
 -
 - NB
 3. Organizational Chart
 - 2 people, not sure roles specifically
only one person/contractor?
- II. Proposed Services
 1. Services to be Provided
 - Still not clear on the specifics will do in Phase A/deliverables
 - Emphasis on subcontractors
 - Like the proposal + procurement reviews
 - What will the average include?
 2. Implementation - Work Plan
 - Not found specific deliverables
 - Overall identify + broad doesn't give sense of project.
- III. Cost

1. Total	• 35000
2. Per employee	• 194,44



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202104061
RFP TITLE: Equity Audit and Training

Jennifer Tarr

I, (print name at right) _____
accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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

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

I understand that the evaluation process is to be conducted in an impartial manner. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

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

DocuSigned by:

Janet Tarr

7/19/2021

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Signature

Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202104061
RFP TITLE: Equity Audit and Training

Mary Herman

I, (print name at right) _____
accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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DocuSigned by:

Mary Herman

3BE8DF-C0809D44D...

Signature

7/19/2021

Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202104061
RFP TITLE: Equity Audit and Training

I, (print name at right) Page Nichols
accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. 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 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.

DocuSigned by:
Page Nichols
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Signature _____ Date 7/20/2021



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202104061
RFP TITLE: Equity Audit and Training

I, (print name at right) Amelia Lyons
accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. 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 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.

DocuSigned by:

Amelia Lyons

99EF5DD0CF4FAA8...

7/19/2021

Signature

Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202104061
RFP TITLE: Equity Audit and Training

Jessica Nixon

I, (print name at right) _____
accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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

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

I understand that the evaluation process is to be conducted in an impartial manner. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

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

DocuSigned by:
Jessica Nixon
B0CA32204012424...

7/16/2021

Date