

**State of Maine**  
**Master Score Sheet**

<b>RFP# 202204060</b>					
<b>Lobbyist Public Disclosure System</b>					
<b>Bidder Name:</b>		<b>BALLAST</b>	<b>BINARY</b>	<b>CIVIX</b>	<b>DOMINION</b>
<b>Proposed Cost:</b>		<b>\$92,000</b>	<b>\$1,970,040</b>	<b>\$635,600</b>	<b>\$732,000</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	30	7	20	17	17
Section III: Proposed Services	40	7	17	19	15
Section IV: Cost Proposal	30	30	1.40	4.34	3.77
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>44</u></b>	<b><u>38.40</u></b>	<b><u>40.34</u></b>	<b><u>35.77</u></b>
<b>Bidder Name:</b>		<b>DORGER</b>	<b>INTEGRAL</b>	<b>MAPLIGHT</b>	<b>PACIFIC POINT</b>
<b>Proposed Cost:</b>		<b>\$939,000</b>	<b>\$873,000</b>	<b>\$569,800</b>	<b>\$1,097,223</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	30	23	23	27	23
Section III: Proposed Services	40	31	32	35	20
Section IV: Cost Proposal	30	2.93	3.16	4.84	2.51
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>56.93</u></b>	<b><u>58.16</u></b>	<b><u>66.84</u></b>	<b><u>45.51</u></b>

**State of Maine**  
**Master Score Sheet**

RFP# 202204060			
Lobbyist Public Disclosure System			
Bidder Name:		RFD	WSD
Proposed Cost:		\$754,000	\$964,566
Scoring Sections	Points Available		
Section I: Preliminary Information	Pass/Fail	Pass	Pass
Section II: Organization Qualifications and Experience	30	25	19
Section III: Proposed Services	40	20	37
Section IV: Cost Proposal	30	3.66	2.86
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>48.66</u></b>	<b><u>58.86</u></b>



STATE OF MAINE  
COMMISSION ON GOVERNMENTAL ETHICS  
AND ELECTION PRACTICES  
135 STATE HOUSE STATION  
AUGUSTA, MAINE  
04333-0135

**Award Justification Statement  
RFP# 202204060  
Lobbyist Public Disclosure System**

**I. Summary**

Through this RFP the Commission sought proposals for services to provide a Lobbyist Disclosure System with functionality that allows lobbyists to register and file reports, and a database for the public to view and search for specific information. Ten bidders responded to the RFP: Ballast Academic Software Solutions, Inc.; Binary Tech Systems, Inc.; PCC Technology, Inc. dba Civix; Dominion Digital dba Waypath; Dorger Software Architects, Inc.; Integral Financial Technology, Inc.; MapLight; Pacific Point, Inc.; RFD & Associates, Inc.; and WSD Digital, LLC.

**II. Evaluation Process**

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

**III. Qualifications & Experience of MapLight**

- 17 years of disclosure experience for government agencies including lobbyist and campaign finance disclosure including the California Secretary of State, and City of Denver, Colorado.
- Vendor understands the need for transparency in government and ease of use for admin filers, users, and the public.
- Staff assigned to project are highly qualified and experienced for this project.
- References from previous/current projects are outstanding and demonstrate a commitment to customer service throughout the project period and beyond.
- Provided all information requested in RFP with an incredible attention to detail.

**IV. Proposed Services by MapLight**

- Provided a comprehensive solution to the Commission's problem by outlining a clear understanding of and willingness to meet all the expectations in the RFP.
- The solution proposed is based on configuring the bidder's current MapLight Disclosure System.
- Technology needs are fully met.
- Support and maintenance have quick response and resolution times.
- Timeline includes deliverables and milestones that fall within RFP and are achievable based on existing product.

**V. Cost Proposal**

Proposed a cost of \$569,800.

**VI. Conclusion**

Out of 100 possible points, the Evaluation Team gave MapLight a score of 66.84. The strengths of the MapLight proposal, having the highest evaluation scores in both Qualifications & Experience, and Proposed Services, outweigh those of the other bidders. The Evaluation Team has determined the proposal submitted by MapLight represents the best value to the State of Maine.



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July 14, 2022

Mr. Derick Ariyam  
Ballast Academic Software Solutions, LLC  
4 Harlem Street  
Rumford, RI 02916

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Ariyam,

This letter is regarding the Request for Proposals (RFP), issued by the State of Maine Commission on Governmental Ethics and Election Practices for its Lobbyist Public Disclosure System. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and is hereby announcing its conditional contract award to:

**MapLight**

The bidder above received the evaluation team's highest ranking. The Commission will now contact MapLight 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 Commission 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 Commission is executed. The Commission 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 is below.

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

Sincerely,

A handwritten signature in blue ink that reads 'Martha Currier'.

Martha Currier  
Assistant Director

**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).



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July 14, 2022

Mr. Samy Subramanian, President  
Binary Tech Systems, Inc.  
18703 Birchwood Groves Drive  
Lutz, FL 33558

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Subramanian,

This letter is regarding the Request for Proposals (RFP), issued by the State of Maine Commission on Governmental Ethics and Election Practices for its Lobbyist Public Disclosure System. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and is hereby announcing its conditional contract award to:

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July 14, 2022

Ms. Karen Gee, Strategic Account Director  
Civix  
3300 W. Esplanade Ave., Ste. 400  
Metairie, LA 70002

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Ms. Gee,

This letter is regarding the Request for Proposals (RFP), issued by the State of Maine Commission on Governmental Ethics and Election Practices for its Lobbyist Public Disclosure System. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and is hereby announcing its conditional contract award to:

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July 14, 2022

Mr. Anthony Wenzel, Principal  
Dominion Digital, Inc. dba WayPath  
2000 W. Marshall St., 2<sup>nd</sup> Floor  
Richmond, VA 23220

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Wenzel,

This letter is regarding the Request for Proposals (RFP), issued by the State of Maine Commission on Governmental Ethics and Election Practices for its Lobbyist Public Disclosure System. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and is hereby announcing its conditional contract award to:

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July 14, 2022

Mr. Scot Dorger, President  
Dorger Software Architects, Inc.  
762 Downtowner Loop W #100  
Mobile, AL 36609

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Dorger,

This letter is regarding the Request for Proposals (RFP), issued by the State of Maine Commission on Governmental Ethics and Election Practices for its Lobbyist Public Disclosure System. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and is hereby announcing its conditional contract award to:

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July 14, 2022

Mr. Tom Cohen, CEO  
Integral Financial Technology, Inc.  
123 Main Street, Suite 4  
North Andover, MA 01845

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Cohen,

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July 14, 2022

Mr. Daniel Newman, President  
MapLight  
2140 Shattuck Ave., Ste. 603  
Berkeley, CA 94704

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Newman,

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July 14, 2022

Ms. Deena White Tearney  
Pacific Point, Inc.  
427 Launiu Street 609  
Honolulu, HI 96815

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Ms. White Tearney,

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July 14, 2022

Mr. Tom Lynch, Client Engagement Manager  
RFD & Associates, Inc.  
401 Camp Craft Road  
Austin, TX 78746

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Lynch,

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July 14, 2022

Mr. Greg Amato, Director of Sales and Capture  
WSD Digital, LLC  
750 Main Street, Suite 327  
Hartford, CT 06103

RE: Notice of Conditional Contract Award for RFP #202204060, Lobbyist Public Disclosure System

Dear Mr. Amato,

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BALLAST  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>7</b>
Section III. Proposed Services	<b>40</b>	<b>7</b>
Section IV. Cost Proposal	<b>30</b>	<b>30</b>
<b><u>Total Points</u></b>	<b><u>100</u></b>	<b><u>44</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BALLAST  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BALLAST  
**DATE:** 6/14/2022

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

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

**Evaluation Team Comments:**

- No government or lobbying experience.
- Only has experience with events.
- No experience with data spanning multiple years.
- Not much experience with reporting, schedules, multiple reports.
- Lacks overall experience and has no crossover experience with MEC issues.
- Not provided – organization chart, balance sheets, or current experience.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BALLAST  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>7</b>

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**Evaluation Team Comments:**

- Proposal is not specific and doesn't provide information to base a decision.
- No details, testing plan, etc.
- Does not address the issues in RFP.
- Not clear what type of solution they are offering.
- No wireframes provided.
- Unrealistic workplan.
- Elements and scope are not addressed in this proposal.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BALLAST  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$92,000</b>	x	<b>30 points</b>	=	<b>30</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BINARY Tech Systems  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>20</b>
Section III. Proposed Services	<b>40</b>	<b>17</b>
Section IV. Cost Proposal	<b>30</b>	<b>1.40</b>
<u>Total Points</u>	<u>100</u>	<u>38.40</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BINARY Tech Systems  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BINARY Tech Systems  
**DATE:** 6/14/2022

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

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

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**Evaluation Team Comments:**

- Bidder has government experience with lobbyist system- NJ.
- Small shop, good references.
- Bidder understands our lexicon and data needs.
- Quality of writing in proposal is not great and of concern.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BINARY Tech Systems  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>17</b>

**Evaluation Team Comments:**

- Great history of government work. They understand the purpose of disclosure, but it doesn't seem tailored to our RFP but rather a candidate system. Poor writing and organization throughout, raises questions on how professional their final product would be for MEC.
- Many of the scope of services in the RFP are not addressed in the proposal at all. A lot of functionality is not addressed in the proposal but can be extracted from the wireframes.
- Wireframes and work plan were provided.
- Good overview but didn't follow the format requested in RFP making it difficult to assess this proposal.
- Samples were informative.
- Proposal didn't address the legacy data issue, quality assessment not addressed, implementation plan not addressed.
- .NET462 is concerning as it is an older technology, which could soon be outdated.
- Proposed workplan is short – 85 days – because it will customize the existing system, which was viewed as positive.
- No information provided about how the project management will be done.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** BINARY Tech Systems  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$1,970,040</b>	x	<b>30 points</b>	=	<b>1.40</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** CIVIX  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>17</b>
Section III. Proposed Services	<b>40</b>	<b>19</b>
Section IV. Cost Proposal	<b>30</b>	<b>4.34</b>
<b><u>Total Points</u></b>	<b><u>100</u></b>	<b><u>40.34</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** CIVIX  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** CIVIX  
**DATE:** 6/14/2022

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

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

**Evaluation Team Comments:**

- This is the current vendor for MEC’s lobbyist disclosure system, campaign finance system, and legislative disclosures. Three of the four evaluators have direct experiences interacting with this vendor.
- Historical MEC information about this vendor:
  - i. July 2018 – our current CF went into production and had significant quality problems, with hundreds of issues recorded, which vendor was slow to fix resulting in a large backlog of unresolved issues. This created a loss of credibility of the MEC website with our filers and public, significant drain on MEC staff time, and an impact on morale.
  - ii. 2019 – early 2020 – Backlog of issues continued due to slow reaction by vendor. MEC asked PM already working on our SOSOI module to assist in managing these issues. Still some issues went unresolved.
  - iii. 2020 (election year) – new quality issues were discovered such as totals not being accurate and were not addressed promptly.
  - iv. Summer 2022 – vendor has eliminated backlog. This is the first election year in which few quality issues have been identified.
  - v. Change Requests – Vendor has presented cost estimates for CRs that seem unreasonable to MEC, such as converting the ballot question committees reporting to be the same as PACs. Even if the estimates are justified, the result is that the vendor has not provided solutions that allow MEC to respond to new legal requirements within its budget for this system.
- Lots of government experience, including lobbying clients.
- Proposal has wrong dates for the projects they have with us. For example, SOSOI site didn’t go live until 2020, not 2014 as stated. This lack of attention to detail may be indicative of future work product.
- List of platform clients is not accurate. MA discontinued using this vendor.
- Project 3 in GA dates do not make sense – it launched before it began. Again, attention to detail is critically important to MEC.
- Characterization of our project and work with other states is concerning.
- Provided documents in a different format than requested and was a hassle to open and review.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** CIVIX  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>19</b>

**Evaluation Team Comments:**

- This is the current vendor for MEC’s lobbyist disclosure system, campaign finance system, and legislative disclosures. Three of the four evaluators have direct experiences interacting with this vendor.
- Historical MEC information about this vendor:
  - i. July 2018 – our current CF went into production and had significant quality problems, with hundreds of issues recorded, which vendor was slow to fix resulting in a large backlog of unresolved issues. This created a loss of credibility of the MEC website with our filers and public, significant drain on MEC staff time, and an impact on morale.
  - ii. 2019 – early 2020 – Backlog of issues continued due to slow reaction by vendor. MEC asked PM already working on our SOSOI module to assist in managing these issues. Still some issues went unresolved.
  - iii. 2020 (election year) – new quality issues were discovered such as totals not being accurate and were not addressed promptly.
  - iv. Summer 2022 – vendor has eliminated backlog. This is the first election year in which few quality issues have been identified.
  - v. Change Requests – Vendor has presented cost estimates for CRs that seem unreasonable to MEC, such as converting the ballot question committees reporting to be the same as PACs. Even if the estimates are justified, the result is that the vendor has not provided solutions that allow MEC to respond to new legal requirements within its budget for this system.
- Positives noted – Vendor has lobbyist experience, ADA complaint and propose web-based training videos.
- Proposal is not clear what MEC will receive in 7 months. Although everything is addressed, it is not fully addressed. In this time will we receive their base product and then everything else is a CR?
- Not clear how the testing process would work.
- Many things requested in RFP are not included in their base product (listed as N in the proposal), making too many of our needs customized, which would result in cost increases, including things that are already in the current system that this vendor works on for MEC.
- Not clear about the scope of the proposal analysis – “can be” versus “will be” – which team understood to be more money.
- Proposal is overly large and cumbersome with a lot of duplicative information and sales pitch rather than solution driven information for evaluators on this project.
- MEC’s Proposed SLA had a 15-minute response time for critical items, vendor changed to 4 hours. The difference is concerning.
- Project management plan provided; testing is a right size approach with automated testing tools.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** CIVIX  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$635,600</b>	x	<b>30 points</b>	=	<b>4.34</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DOMINION  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>17</b>
Section III. Proposed Services	<b>40</b>	<b>15</b>
Section IV. Cost Proposal	<b>30</b>	<b>3.77</b>
<u>Total Points</u>	<u>100</u>	<u>35.77</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DOMINION  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DOMINION  
**DATE:** 6/14/2022

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

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

**Evaluation Team Comments:**

- Experience with government agencies, VA lobbyist site in particular.
- 20+ years of government and lobbying experience.
- Did not provide financial information.
- VA lobbyist program search didn't appear helpful to testers and although it looked fine from a public view, is not what MEC is looking for as a solution to this project.
- No names of team members provided for MEC project.
- Organization chart is not clear, is high level and generic.
- VA URL provided required a login, which was not provided. The other URL does not fit our needs.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DOMINION  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>15</b>

**Evaluation Team Comments:**

- Proposal didn't address the big pieces of the RFP including quality assurance, implementation time.
- Positives noted – flexible and configurable solution and training will be provided.
- Did not indicate how data conversion would be used or whether it is in the scope of work.
- Negatives noted - assumes that API, Azure, cloud managed by Maine IT and architecture diagram was too high level and difficult to interpret for the purposes of the evaluation.
- Dynamics 365 sounds like a promising solution, but not enough information.
- 25-week project sounds like a full-time effort for MEC staff. 3 weeks for some parts seems a bit short given issues that could arise.
- Wireframes have good look/feel, but does vendor understand what we're looking for since not all the items requested in RFP are included on them. Perhaps some narrative would've helped us better understand their process.
- QA not addressed; major enhancements require a separate contract.
- Support via email and telephone, no bug tracking system proposed.
- The proposal did not do a good job explaining the vendor's actual solution for MEC.
- No comment on the many functionalities in RFP left evaluators wondering – where is the rest of the proposal?
- Not enough in the proposal to demonstrate that vendor understands what MEC needs.
- Frustrating proposal to review given the experience and awards previously mentioned.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DOMINION  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$732,000</b>	x	<b>30 points</b>	=	<b>3.77</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DORGER  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>23</b>
Section III. Proposed Services	<b>40</b>	<b>31</b>
Section IV. Cost Proposal	<b>30</b>	<b>2.93</b>
<u>Total Points</u>	<u>100</u>	<u>56.93</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DORGER  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DORGER  
**DATE:** 6/14/2022

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

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

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**Evaluation Team Comments:**

- Very professional proposal, long but easy to review.
- Lobbyist clients.
- Previous product descriptions were brief and did not have dates, missed opportunity to provide helpful information.
- Have not built a lobbyist system but appear to be familiar with government projects.
- Good organizational chart with roles explained.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DORGER  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>31</b>

**Evaluation Team Comments:**

- Proposal was organized as requested in RFP, which helped in the evaluation process. Explicit what was in scope and the customizations were identified.
- Proposed solution is Valance software, a layered architecture that is smart to test and easy to maintain.
- Grid and table system is what they appear to propose and what we have now, but we are looking for something more visually appealing.
- A sample form to show us how this solution would work/look for us would have helped us understand the proposal better.
- In the requirements many mentions of “will comply” but didn’t address any more specificity. Data ownership was not addressed at all.
- Nothing about QA and acceptance – just appears to be boilerplate language. Implementation and Support and Maintenance sections did not have any information.
- Wireframes provided did not appear to be the ones requested in the RFP.
- Functional requirements did indicate where functionality was already built, and where configuration/customization were required. All configurations are included in the price.
- No implementation timeline, no breakdown just generic, which is hard to assess.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** DORGER  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$939,000</b>	x	<b>30 points</b>	=	<b>2.93</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** INTEGRAL  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>23</b>
Section III. Proposed Services	<b>40</b>	<b>32</b>
Section IV. Cost Proposal	<b>30</b>	<b>3.16</b>
<u>Total Points</u>	<u>100</u>	<u>58.16</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** INTEGRAL  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** INTEGRAL  
**DATE:** 6/14/2022

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

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

**Evaluation Team Comments:**

- First mention is about a consultant they're bringing on from the MA campaign finance system. Some evaluators thought this was odd.
- Appear to have a good sense of who they are and what they do.
- Great government experience and sounds like they will work around our needs/wants.
- Not clear how the other two projects mentioned apply to our situation.
- Subcontractor in located in India. MEC staff has had issues working on application programs with foreign vendors in the past and found the language barrier and time change led to difficulties with understanding and collaboration. Additionally, it is against State of Maine policy to have data access outside of the US, so no live data can be tested there.
- Concerns that one person may be the sole developer for this project.
- Power Point pages provided are general and not informative to evaluators.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** INTEGRAL  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>32</b>

**Evaluation Team Comments:**

- Bidder appears to understand what MEC is looking for in a solution.
- Provided wireframes but didn't respond to the functional requirements as requested in RFP.
- Good demonstration of MEC needs and what public and filers need and how vendor is prepared to fulfill it.
- No statement that they'll meet all the requirements outlined in the RFP.
- Proposal was not in the format requested in the RFP, which made it difficult to review.
- Data conversion was described at an unnecessarily high level, while other requirements were lacking detail.
- Project management methodology not detailed out.
- Proposed architecture positive, architecture diagram provided.
- Lacking detail on system implementation.
- Vendor recognizes that small enhancements will be necessary and that is an appreciated, realistic approach.
- Bugs/defects in initial solution addressed free of charge.
- Vendor took time to figure out how the solution will work from the users perspective.
- Proposed SLA times were good.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** INTEGRAL  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$873,000</b>	x	<b>30 points</b>	=	<b>3.16</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** MAPLIGHT  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>27</b>
Section III. Proposed Services	<b>40</b>	<b>35</b>
Section IV. Cost Proposal	<b>30</b>	<b>4.84</b>
<b><u>Total Points</u></b>	<b><u>100</u></b>	<b><u>66.84</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** MAPLIGHT  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** MAPLIGHT  
**DATE:** 6/14/2022

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

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

**Evaluation Team Comments:**

- Evaluation team was impressed with good, clear information, state qualifications
- The bidder is clearly mission driven, and understands the transparency needed in government.
- Project information provided clearly explained how relevant that experience is to MEC project.
- Provided everything requested in RFP with incredible attention to detail.
- PM for project appears to be incredibly qualified based on info provided.
- Vendor gave a lot of thought who are the best team for this project.

**EVALUATION OF SECTION III  
Proposed Services**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** MAPLIGHT  
**DATE:** 6/14/2022

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>35</b>

**Evaluation Team Comments:**

- Easy to read and easy to follow proposal.
- The solution proposed is based on configuring the bidder's current product.
- Notes were added to the detailed requirements indicating what is base functionality, what can be configured and may need to be customized.
- Additional functionality includes a configurable calendar and in-app messaging to/from lobbyists.
- The wireframes provided demonstrate that the bidder understands the solution we're looking for leaving evaluators feeling confident that they could handle this project.
- Wireframes were very thoughtful and reflects their understanding of what we need.
- 3 architectural models, fully hosted solution, Azure high availability, good tools all considered positives
- PM plan is good, (hybrid waterfall/agile method)
- Good overview of testing process (QA).
- Support and maintenance has 24/7 self-service, all issues tracked, response times are good (resolution time is 24 hours, with a response time of 15 minutes)
- Proposal includes 200 hours of maintenance per year, and defects are resolved at no cost for the lifetime of the agreement.
- Timeline included deliverables and milestones; 5 months is an achievable goal considering they have a configured product

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** MAPLIGHT  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$569,800</b>	x	<b>30 points</b>	=	<b>4.84</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** PACIFIC POINT  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>23</b>
Section III. Proposed Services	<b>40</b>	<b>20</b>
Section IV. Cost Proposal	<b>30</b>	<b>2.51</b>
<b><u>Total Points</u></b>	<b><u>100</u></b>	<b><u>45.51</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** PACIFIC POINT  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** PACIFIC POINT  
**DATE:** 6/14/2022

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

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

**Evaluation Team Comments:**

- Vendor with HI Lobbyist site, which is one of the better public sites MEC has seen.
- The evaluation team felt that more information was needed in the project history section regarding how that experience relates to MEC proposal.
- Would have liked more information on who was chosen for the team – either brief blurbs or resumes.
- Proposal seemed like a long pitch for Salesforce.

**EVALUATION OF SECTION III**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** PACIFIC POINT  
**DATE:** 6/14/2022

**Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>20</b>

**Evaluation Team Comments:**

- Proposal read as a long pitch for Salesforce in lieu of what they can do for MEC with this product.
- The proposal mostly followed the RFP, but some of the answers included additional links for team to look at resulting in them not being reviewed by team due to time constraints. Instead, this information should be included in the proposal.
- We are seeking a turnkey system, but this proposal says that we can do it ourselves. Unfortunately, we do not have the staff or technology experience to do this.
- This vendor proposes a business relationship different than what we expect.
- Weekly backup is not acceptable.
- Need more than one method of training – proposal lists one Power Point.
- The bidder did a good job explaining the hybrid/agile solution; ID of key resources; and roles and responsibilities.
- Writing UAT test scripts is out of scope, proposal states that the client tests the system and logs bugs.
- “Support goal to make MEC self-sufficient, only using them when needed.” This statement suggests to MEC that they do not want us to contact them for help.
- All requirements were addressed by indicating whether the functionality already exists, is configurable, or needs to be customized.
- Bidder does work in client’s Salesforce so the Salesforce and Formstack subscriptions need to be secured and in place to start implementation
- Wireframes were generic and unsatisfactory.
- While it appears that overall this vendor could perform the work, it is not the relationship we are looking for with a vendor.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** PACIFIC POINT  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$1,097,223</b>	x	<b>30 points</b>	=	<b>2.51</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** RFD  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

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<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>25</b>
Section III. Proposed Services	<b>40</b>	<b>20</b>
Section IV. Cost Proposal	<b>30</b>	<b>3.66</b>
<b><u>Total Points</u></b>	<b><u>100</u></b>	<b><u>48.66</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** RFD  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** RFD  
**DATE:** 6/14/2022

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>25</b>

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**Evaluation Team Comments:**

- Bidder seems to clearly understand our filers come from different backgrounds and need different levels of assistance.
- Their 4<sup>th</sup> project with the TX Land Office is interesting as they went in and rescued a site they didn't create, which says a lot about their capabilities.
- This is a true, cloud native solution to our problem and demonstrates that they understand our work.
- Full resumes were unnecessary, blurbs would've been more reader friendly.
- Proposal provided everything we asked for in the RFP.
- Evaluators got the sense that the vendor could perform the work based on what was provided in this section.
- Work performed in project 2 was not clear; it reads like they were a subcontractor.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** RFD  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>20</b>

**Evaluation Team Comments:**

- Proposal makes a lot of assumptions. Why is there such a big focus on a penetration vendor? SOM can do this.
- Vendor proposes a 100% cloud native solution like systems developed and implemented for other clients.
- Bidder asserts that they are not a product company but are building MEC a system.
- It is not clear whether 100 hours of data conversion is enough.
- While it appears vendor is committed to everything in RFP, “we will comply” comments are a waste of time for the reader; requirements section lacks details that would help with evaluation.
- Bidder wants to use staff member in Canada, this may be an issue as no data can be accessed outside of the US
- Proposal was disappointing, lacked many details about the product the vendor will build, and instead had a “trust us, we can do it” vibe.
- Proposal seeks to change the contract terms and it is not clear why. Team members questioned whether vendor has confidence in their solution.
- Wireframes were easy to understand but they were not impressive.
- Technically, it appears vendor could perform the work, but the customer interface is lacking.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** RFD  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$754,000</b>	x	<b>30 points</b>	=	<b>3.66</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** WSD  
**DATE:** 6/14/2022

**SUMMARY PAGE**

**Department Name:** Ethics Commission  
**Name of RFP Coordinator:** Martha Currier  
**Names of Evaluators:** Jonathan Wayne, Emma Burke, Diana Olore, and Martha Currier

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>XX</b>	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>30</b>	<b>19</b>
Section III. Proposed Services	<b>40</b>	<b>37</b>
Section IV. Cost Proposal	<b>30</b>	<b>2.86</b>
<u>Total Points</u>	<u>100</u>	<u>58.86</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** WSD  
**DATE:** 6/14/2022

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** WSD  
**DATE:** 6/14/2022

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

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

**Evaluation Team Comments:**

- Anand Balasubramanian used to work with PCC who previously had a contract with MEC, but current staff do not recall working closely with him.
- Staff is well-qualified with clear government experience and built their own program.
- This is a young company staffed with resources with several years of related experience.
- Some of the projects listed are years into development, and it is not clear why.
- As a company there appeared to be a lack of lobbyist application experience, though individual staff have some related experience.
- Not enough detailed information for this area to make an evaluation.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** WSD  
**DATE:** 6/14/2022

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40</b>	<b>37</b>

**Evaluation Team Comments:**

- Pre-developed core solution components will be brought to the solution development iterations as needed to avoid complete custom development, but fields, rules, workflow layouts, and other features will be configured or customized to the exact MEC requirements stated in RFP
- All sections of RFP were addressed in the RFP format, which made review of proposal more streamlined.
- The evaluation team was impressed with the detail and knowledge provided and the anticipation of our needs outside of what is requested in the RFP.
- Evaluation team noted that “proposal is a turnkey solution” is exactly what we asked for.
- Wireframes – show the ReFrame tool and it is clear they went the extra mile with these.
- Proposal is for a cloud native solution that is configurable.
- The proposal included a great data conversion explanation, Bidder clearly understands the importance of a thoroughly tested solution.
- Product by November 2022 is aggressive regardless what is the ReFrame product, too many potential issues.
- Data conversion, QA, Testing, Implementation have all been thought through and well documented.
- Bidder will provide first-line technical support to MEC staff via a dedicated product support team.
- Proposed SLA critical response time is 4 hours, which deviates greatly from the 15 minutes proposed by MEC.
- Very thorough proposal and they clearly have thought through what they would need to do to provide MEC with a solution.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER:** WSD  
**DATE:** 6/14/2022

**EVALUATION OF SECTION IV  
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$92,000</b>	÷	<b>\$964,566</b>	x	<b>30 points</b>	=	<b>2.86</b>

**Evaluation Team Comments:**

None. This is based on a formula set by state procurement.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Ballast Academic Software Solutions, LLC

**DATE:** May 26, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

\*\*\*\*\*

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

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: History of making custom applications with large number of users; sending bulk notifications to various groups and subgroups
    - I: Seems their history is mainly about scheduling and calendaring, which does fit some of what we need
    - N: Not seeing anything about filing or filed elements, or different types of credentials
  - Project History
    - Project One - University of Buffalo
      - P: Describes a website that has public viewers, posters, and administrators
      - N: Seems lacking in complexity
    - Project Two - Pacific Ancient and Modern Language Association
      - P: Discusses automated scheduling aligned to rules and complex logic; large number of users
      - N: Again, seems lacking in complexity, and also seems to be to serve a short-duration event
    - Project Three - Northeast Modern Language Association
      - P: Serves large number of users
      - N: Seems like it would be lacking in complexity for a short-term event
  - Personnel on Project
    - P: No subcontracting
    - Michael Becker/Project Manager
      - P: Skilled project manager
      - N: Coalition building, community organizing, and alliance builder are not skill sets we need on this project
    - Derick Ariyam/Senior Software Engineer:
      - P: Excellent to have access to co-founder; has worked on many government organizations building large-scale systems
    - Betty Landry/Senior Business Analyst/Backend-Engineer
      - P: Experience building high-level complex requirements into a system
- Proposed Services
  - Proposed Solution & Project Plan
    - P: Fully custom application; simple and intuitive interface; robust communication, alert and notification module; browser and device agnostic
    - **Public Portal**
      - P: Special attention will be given to this section so it is accessible and professional; built in guidance on screen; robust search function allowing

## STATE OF MAINE INDIVIDUAL EVALUATION NOTES

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Ballast Academic Software Solutions, LLC

**DATE:** May 26, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

- downloading and exporting of filings; visualizations and analytics of data; ad hoc reports as well as canned reports
  - **Internal Portal**
    - P: Minimize repetitive inputs; comprehensive communications model;
    - N: Two-factor security will not be a good fit for our users, and will cause a lot of consternation. No super secure data is being entered into this site and I am concerned any extra security will inhibit access to our filers
  - Timeline
    - **High-level Timeline Chart**
      - N: No mention of detailed testing by Ballast before testing in UAT by Ethics
  - Infrastructure and Architecture
    - N: Multi-factor authentication just isn't needed
    - P: Logging and auditing, and every action performed by user will be logged; Ballast is notified of unexpected application errors
- Overall notes:
  - P: Small, dedicated company to customer service and doing everything in-house. Enjoy making custom sites, and are accustomed to making sites based around schedules and calendars.
  - N: I am concerned that their history does not contain a client filing many reports over time, and that they have been more event based. I don't remember seeing notes about handling the joint registration aspect that is unique to what we need for our lobbying site. Essentially, I am concerned with their experience and proposal they are not prepared for the complexity of the site we need.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Ballast  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

Does not seem to have experience with this type of govt application  
Experience with conference programs doesn't translate to our filers

**Subcontractors** will not be used.

2. **Organizational Chart** - Not provided
3. **Litigation** – none
4. **Financial viability** – Not provided
5. **Certificate of insurance** – does not currently have, but has in the past

**II. Proposed Services**

The proposal is very short and is not specific, and as such doesn't give us much information to base a decision on such as – can they do the work? what are their solutions to our problem? The proposal doesn't promote any confidence that they could do this job.

**Services to be Provided:** Left a lot of required RFP sections out and didn't format as we requested.

**Features of the Lobbyist Public Disclosure system** Hard to identify since they didn't provide any info on point.

**Legacy Data conversion** No information provided.

**User training and documentation** No information provided.

**Technical Requirements** .NET Core 6.0, MVC, Restful API, MS SQL DB

**Project Management and Work Plan** Not clear based on the info provided.

**Quality Assurance and Acceptance** Not clear based on the info provided.

**Implementation** Not clear based on the info provided.

**Support and Maintenance** Not clear based on the info provided.

**Appendix F - Functional Requirements** Says they'll comply, no additional info.

**Wireframes** Not provided

**Implementation – Work plan** Not clear based on the info provided.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Ballast Academic Software Solutions, LLC

**DATE:** June 6, 2022

**EVALUATOR NAME:** Jonathan Wayne

**EVALUATOR DEPARTMENT:** Ethics Commission

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**Organization Qualifications and Experience**

Overview of Organization	P
Subcontractors	P
Organizational Chart	P
Litigation, financial viability, COI	P

**Proposed Services**

Functional requirements	N
Wire frames	N
Features of system	Mix of P and N

*Availability*

*User authentication and roles*

*External system integrations*

*Data collection*

*Save partially completed data*

*Status tracking and reporting*

*Reporting*

Legacy data conversion	N
------------------------	---

User training and documentation	N
---------------------------------	---

Technical Requirements	Mix of P and N
------------------------	----------------

Project Management and Work Plan	N
----------------------------------	---

Quality Assurance and Acceptance	N
----------------------------------	---

Implementation	N
----------------	---

Support and Maintenance	N
-------------------------	---

*Overall comment: proposal does not address functional requirements. Promises of performance are general and it is unclear to what degree bidder understands requirements of project. Doesn't meet minimum requirements.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Ballast  
DATE: 6/5/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*

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

\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- No Government Experience
- Mostly event software, no evidence of systems where data spans multiple years
- No lobbyist system experience

**2. Subcontractors**

- Not used

**3. Organizational Chart** -No org chart provided, though three resources identified

**4. Litigation** – none

**5. Financial viability** – No balance sheets provided

**6. Certificate of insurance** – provided, but not current

**II. Proposed Services**

**Services to be Provided:**

Not all sections of RFP addressed

Did not follow format of RFP, and did not address

**Features of the Lobbyist Public Disclosure system**

Bidder states that they will deliver a system that meets (and exceeds) requirements, but little detail provided

**Legacy Data conversion**

Nothing in proposal

**User training and documentation**

Bidder mentions that there will be training, but no detail provided

**Technical Requirements**

.NET Core 6.0

MVC, Restful API

MS SQL DB

Many significant areas from RFP not addressed

**Project Management and Work Plan**

No project management methodology presented

Bidder indicates that a Project manager will be assigned

**Quality Assurance and Acceptance**

Bidder indicates that testing will be done, though no detail provided

**Implementation**

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Ballast

DATE: 6/5/22

EVALUATOR NAME: D. Olore

EVALUATOR DEPARTMENT: DAFS/MaineIT

High level timeline chart included

**Support and Maintenance**

Other than 1 reference that indicates there will be a support phase, no information was given

**Appendix F - Functional Requirements**

General statement made about complying with all requirements, no detail

**Wireframes**

Not provided

**Implementation – Work plan**

Not realistic for a custom development effort

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Binary Tech Systems Inc.  
**DATE:** May 27, 2022  
**EVALUATOR NAME:** Emma Burke  
**EVALUATOR DEPARTMENT:** Maine Ethics Commission

\*\*\*\*\*

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

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**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: Authorized vendor for NJ ELEC; modernized legacy systems; we would get the same system; has a lobbying filing system already; has search features built in; overall seems to be a vendor built for what we are trying to do
    - N: Concerned about writing quality in this section, as having a very professional website is of key importance
    - I: Recommendation from NJ ELEC mentions all maintenance is done after hours
    - Q: Is Binary domestic US based?
  - Project History
    - Project One – NJ ELEC
      - P: A campaign finance e-filing system
    - Project Two – NJ ELEC
      - P: Electronic payment system for lobbyists
    - Project Three – NJ ELEC
      - P: Lobbyist filing search page
      - N: Screenshots included appear very complicated
  - Personnel on Project
    - P: No subcontracting; very experienced group
- Proposed Services
  - Executive Summary
    - P: Already have a lobbyist filing system
  - Proposed Signature Module
    - P: Obviously we need some level of security bypass to log in, and I feel this is a usable approach by our users; understanding MEC admins would need to be able to accept/change/regenerate log ins as needed
    - Q: Would users be able to log into multiple clients using ONE log in? Would the admin and legal assistants who file many lobbying reports be comfortable with an actual signature of theirs appearing on the report, or would they be signing for the lobbyist?
  - General Requirements:
    - P: Site would work on mobile devices; PDF availability; backup and recovery strategies included
    - Q: What does 'develop system using US-based resources' mean?
  - Non-Functional Requirements
    - Q: How high of security levels does this mean? What happens if more than 100-200 are on it at the same time? What happens as records build over time – will the site

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Binary Tech Systems Inc.

**DATE:** May 27, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

- o accommodate that? What kind of look and feel would the users have – users as in filers? Or users as in MEC admins?
    - N: High security for low-risk data is an obstacle for our users; 3-4 second page rendering seems slow to me; I am concerned about the limited capacity the site is built to withstand
    - P: Audit (or event log) capturing;
  - o Functional Requirements:
    - P: Role limiting; customizable roles; tracking multiple clients; user delegation; signatory/sign-off ability;
    - N: Third-party authentication services are likely to cause more problems with our users than help; there seems to be some trouble distinguishing between campaign finance filings and lobbying filings, and what this RFP is for; this section really feels like it trends toward election and campaign finance and less towards lobbying
    - Q: Who is super-admin? Does this mean that someone could scan a deposit or other record and the system could read it, and add it to a report appropriately?
    - I: Uploading scanned files and attaching to reports
- Overall notes:
  - o P: Company that has history in making campaign finance and lobbying filing sites, therefore knows the lexicon and understands the purpose of having a disclosure website. Knows the relationship between lobbyists and clients and what is reported
  - o N: This does not seem tailored to Maine's RFP, but a general proposal for a campaign finance filing system, with lobbying included. There is no discussion of LD numbers and much of the proposal is focused on candidates and elections and not on lobbying. I am also concerned with the poor writing and organization of the RFP and how professional of a product we would receive.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Binary Tech Systems

**DATE:** June 7, 2022

**EVALUATOR NAME:** Jonathan Wayne

**EVALUATOR DEPARTMENT:** Ethics Commission

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***Organization Qualifications and Experience***

*Overview of Organization* P

*Subcontractors* P

*Organizational Chart* P

*Litigation, financial viability, COI* P

***Proposed Services***

*Functional requirements* N

*Wire frames* P (more extensive)

*Features of system* Mix of P and N

*Availability*

*User authentication and roles*

*External system integrations*

*Data collection*

*Save partially completed data*

*Status tracking and reporting*

*Reporting*

*Legacy data conversion* N

*User training and documentation* N

*Technical Requirements* Mix of P and N

*Project Management and Work Plan* Mix of P and N (work plan very specific)

*Quality Assurance and Acceptance* N

*Implementation* N

*Support and Maintenance* N

*Overall comment: does not address all functional requirements (some of the descriptions may relate to campaign finance). Wireframe slides do demonstrate some understanding of functional requirements. Elements of Part II of RFP are not addressed completely or in sequence.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: **BInary**  
DATE: **6/6/22**  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**I. Organization Qualifications and Experience**

1. **Overview of Organization** – experience with NJ e filing since 2011 and would implement that program here. Letter of recommendation from NJ govt staff.
2. **Subcontractors** will not be used.
3. **Organizational Chart** – Provided and easy to understand
4. **Litigation** – none
5. **Financial viability** – Provided
6. **Certificate of insurance** – Provided

**II. Proposed Services**

They propose using a program they have been using called BitsEFile365.com. It is clear that this proposal was not proofread prior to submission as there are sentences that just end, things that appear to be cut and pasted from previous proposals and in many cases here for a campaign finance system, which is not what we are seeking. The proposal itself abruptly ends and appears to be missing information. These errors left me with a negative impression of this company and their proposal.

**Services to be Provided:** Left a lot of required RFP sections out and didn't format as we requested.

**Features of the Lobbyist Public Disclosure system** Hard to identify since they didn't provide much information for us to base a decision on.

**Legacy Data conversion** No information provided.

**User training and documentation** No information provided.

**Technical Requirements** .NET 4.6.2, SQL,

**Project Management and Work Plan** Not clear based on the info provided.

**Quality Assurance and Acceptance** Not clear based on the info provided.

**Implementation** Not clear based on the info provided.

**Support and Maintenance** Not clear based on the info provided.

**Appendix F - Functional Requirements** Not clear based on the info provided.

**Wireframes** Provided more than we asked for – the look and feel is good.

**Implementation – Work plan** Not clear based on the info provided.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Binary Tech  
DATE: 6/6/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*

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

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**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Government Experience
- Lobbyist system experience
- Existing application
- Small company
- Proven product
- Good reference
- Provided links to existing NJ lobbyist system

**2. Subcontractors**

- Not used

**3. Organizational Chart -Provided**

**4. Litigation – none**

**5. Financial viability – Balance sheets provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

Provided good overview of what will be included

Did not follow format of RFP, so not easy to see if any requirements are missing

Sample diagrams, wireframes, and system links to existing and sample screens very helpful and informative

**Features of the Lobbyist Public Disclosure system**

**Legacy Data conversion**

Not addressed

**User training and documentation**

Not addressed

**Technical Requirements**

Component Diagram provided

.NET Framework 4.6.2 – older technology

Azure Cloud

**Project Management and Work Plan**

Work plan provided (includes training and testing)

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Binary Tech

DATE: 6/6/22

EVALUATOR NAME: D. Olore

EVALUATOR DEPARTMENT: DAFS/MaineIT

**Quality Assurance and Acceptance**

Not addressed

**Implementation**

Plan not addressed

**Support and Maintenance**

Cloud hosted, vendor supported

**Appendix F - Functional Requirements**

Considerable list provided, however, did not align with order in RFP, so difficult to assess if anything is missing.

**Wireframes**

Provided overview, diagrams, and links to existing and sample application screens. All required wireframes (plus more) were provided.

**Implementation – Work plan**

Short timeline – 85 days as this is not a new build, rather a customization of an existing system.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Civix aka PCC Tech  
**DATE:** June 1, 2022  
**EVALUATOR NAME:** Emma Burke  
**EVALUATOR DEPARTMENT:** Maine Ethics Commission

\*\*\*\*\*

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

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**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: Long history of state and local government work, including election administration, campaign finance reporting, and lobbyist reporting; currently runs lobbyist reporting sites for 9 different states (including Maine)
  - Project History
    - Project One – State of Maine
      - P: Already the vendor for all of MEC's campaign finance sites
      - N: Have all the dates wrong for the work they have done for MEC
    - Project Two – State of Alabama
      - P: Campaign finance software
    - Project Three – Georgia Government Transparency and Campaign Finance Commission
      - P: Fully integrated campaign finance and lobbying reporting site
      - N: Description of project doesn't make sense – Civix was selected in July 2020 and the site went fully live two months beforehand? The inaccuracy is concerning
  - Personnel on Project
    - P: No subcontracting; very experienced group; Agile delivery process; project schedule and release plan is delivered early on in the project.
- Proposed Services
  - Services to be Provided
    - P: Already have a lobbyist filing system; use of the word 'simple'; mentions being ADA compliant; web-based training videos; they know Maine entities and our limitations; know we need to avoid lots of tech help calls
    - I: Mentions Citizens United case and greater interest from the public; GovTech 100 list;
    - P: Detailed info on support package; very clean looking website screenshot, easy to understand, and matches campaign finance; immediate to do section;
    - N: Seven months to implementation; so many functionalities saying they would have to be configured later, it sounds like we would get only a shell of what we need at first; very little discussion on the solution
  - Scope of Services to be Provided
    - P: Embedded help icons; will interface with Maine Legislature and InforME; authorized agents can file multiple reports under one log in; registration easy with known history of previous clients;
  - Functional Requirements:

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Civix aka PCC Tech

**DATE:** June 1, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

- P: Incredibly detailed responses to each requirement
- Overall notes:
  - P: This is a detailed proposal that touches on all functionalities. The familiarity with Maine is clear.
  - N: I am very concerned about the lack functionalities that would be included in our base product. There were so many functionalities that were not to be included, or only included if needed, even though it was clear in the RFP they were needed. It does not seem the items we require that would need to be customized would be able to make it into the product we would get in seven months.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: CIVIX  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**Organization Qualifications and Experience**

- Civix is our current vendor for the lobbyist e-filing site.
- LOB clients from 9 states, multiple other CFR systems, and SOSOI states = experience in this area.
- The dates in App C are all over the place, which is concerning since they're talking about the project with us and that attention to detail *should* be spot on. Makes me wonder if other details in proposal are correct. GA dates – went live before they started the project?? I assume a typo here, but attn to detail is critical!
- Staff are all in-house
- Provided what appears to be track change document draft – this is sloppy, again, makes me wonder about their attn to detail. Other pages in PMP clearly state DRAFT – so is this the final version??
- Phases of work are clear, but methodology gets a bit in the weeds, and doesn't often refer to Maine, so this must be just a general template for their proposals. Training section – I don't see anything that will be available to public users.

**Proposed Services**

- Civix understands our needs and current system and are offering their off the shelf solution.
- Q- what is an evergreen solution? (p.3)
- P – this program would allow for nationally available updates at no addl cost.
- This section, like those before it, seems a bit too pitchy to me and not as focused as it could be offering the solutions requested in the RFP. If it was condensed it would be a much better read – this lack of pithiness makes for a long document.
- Wireframes provided are easy to read/maneuver/understand/clean. Has a very similar look/feel to our e-filing system, which is also based with Civix.
- Q- p 16 references MEC line “The proposed system must be able to meet all functional requirements listed in Appendix F”. Civix response is that this is an out of the box solutions and “any functionality that is not provided can be added through an additional custom effort.” Does this mean that if it isn't already part of their program, we will have to incur an addl cost to get what we've asked for in the RFP?
- Q – re: Data Conversion – They recommend a full data conversion, citing a “minimal savings” to do a partial conversion as we requested in the RFP. What is their definition of minimal, which might be big to us?
- User training can be provided in a digital format for lobbyists, which is helpful for our filers.
- Audit and accountability section went on for way too long and got in the weeds too much for me.
- Appendix F – has many Ns – does that mean they are not included in the cost proposal and would be extra? If it is included in the proposal, when do we get them – timeline is about 7 months, so I wonder whether we'd get these Ns done before or after the launch. Based on our experience with Civix to date, it usually takes them a long time to make changes for us, so is 7 months reasonable?

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Civix (PCC Technology, Inc.)

**DATE:** June 6, 2022

**EVALUATOR NAME:** Jonathan Wayne

**EVALUATOR DEPARTMENT:** Ethics Commission

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**Organization Qualifications and Experience**

Overview of Organization	P
Subcontractors	P
Organizational Chart	P
Litigation, financial viability, COI	P

**Proposed Services**

Functional requirements	P (with some concerns)
Wire frames	P (with some concerns)
Features of system	P
Availability	
User authentication and roles	
External system integrations	
Data collection	
Save partially completed data	
Status tracking and reporting	
Reporting	
Legacy data conversion	P
User training and documentation	P
Technical Requirements	P
Project Management and Work Plan	Mix of P and N (e.g., no timing of milestones)
Quality Assurance and Acceptance	P
Implementation	P
Support and Maintenance	P

*Overall comment: very specific proposal, although it included high degree of boilerplate. Concerns include: some functional requirements are not met within contract price, nonspecific time for resolving bugs, quality problems in lobbyist disclosure applications delivered to other states, timing of milestones not addressed, user interface pictured in RFP only used in one state, AR (and not in GA). In GA application, lobbyists are warned that reports are not showing up, suggesting quality problems. The public access sites for GA and AR contain quality issues. This was not requested in the RFP but proposal contains no suggestion what data entry for entering monthly reports would be like.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Civix  
DATE: 6/6/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*  
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\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Government Experience (22 entities, including SOM)
- Existing Lobbyist software
- Established Company with extensive relevant experience
- Dates incorrect in some project history

**2. Subcontractors**

- Not used

**3. Organizational Chart - Provided**

**4. Litigation – none**

**5. Financial viability – High level balance sheets provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

**Understand SOM challenges**

Though very thorough in that all sections were addressed and the RFP structure closely followed, not enough emphasis on the actual solution.

Propose using Civix Election platform for base system, and then configuring and customizing for specific SOM requirements based on hourly rate

Some information duplicated (e.g. security and privacy, Agile ceremonies, etc.) making the document overly large and cumbersome

**Features of the Lobbyist Public Disclosure system**

SLA response time of 4 hours for critical items

**Legacy Data conversion**

Propose converting all data

“Reducing the amount of data reviewed will result in some time savings for MEC staff but will not adjust the vendor’s cost”

**User training and documentation**

Suggested more than was requested

Training Plan provided

**Technical Requirements**

Uses NIST CSF guidelines and standards

Cannot use Maine.gov/LobbyistDisclosure URL

**Project Management and Work Plan**

Explains use of Agile Framework, and does propose iteration for development, though it appears that all requirements will be determined in Sprint 0, and not discovered iteratively.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Civix

DATE: 6/6/22

EVALUATOR NAME: D. Olore

EVALUATOR DEPARTMENT: DAFS/MaineIT

Project Management plan provided

**Quality Assurance and Acceptance**

Right-size approach to test cases

Automated testing

**Implementation**

'Civix will address the identified gaps. Based on a specified amount of effort, the client will identify and prioritize which gaps will be addressed" p95

**Support and Maintenance**

Standard support package proposed, though other levels shown as well

**Appendix F - Functional Requirements**

There are several key areas that are not provided or only partially provided in the base application which will require a customization effort, including:

Some client information

Lobbying Firms

Some expenditure types

Some contact information

Harassment training status, extension request, waiver request, fee paid

Some search filters

Some Profile page information

Some public profile entity types

Lobbyist/Associate

Legislative committees

Some Registered User home Page information

Compensation

Non-session waiver and termination

Some events for officials information

Some expenditure on behalf of officials information

Original source

Archiving

Some legislative designee information

Grassroots lobbying

In addition, there was some functionality that was marked as not provided, where customization was not offered as an option, including:

Ad hoc query search on public site

Public search will return all reports, not just those with positive data

Only administrative user has ability to add a registration from within the application

Principal contact information

The administrative user does not receive an email confirmation for newly registered accounts

Covered officials

Report due dates are set by date and not by hour/minute

**Wireframes**

Included

**Implementation – Work plan**

7 month timeline, preliminary work plan submitted

Not clear how much customization is included in project

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Dominion Digital aka Waypath  
**DATE:** 6/6/22  
**EVALUATOR NAME:** Martha Currier  
**EVALUATOR DEPARTMENT:** Ethics

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience - Experience with the VA lobbyist system for the past 5 years and other state agencies. Did not provide any financials – attn to detail? The VA site wasn't clear to me, and they didn't provide detail to work with in this section, so it made it hard to assess
  
- Proposed Services
  - Understands what we're dealing with based on their experience.
  - Again, not enough here for us to decide if what they are offering is going to fit our needs, more detail and less cut and paste from other proposals would be helpful for evaluation purposes.
  - Positive – the online help and user guides online would be helpful for our users
  - 25 weeks? Seems fast – how can their folks get up to speed on our system, develop and test, work out the kinks, etc. in this time? Not clear in proposal.
  - I am not certain they understand the solution we're seeking if they do it is not clear in the proposal.
  - Review of proposal made me wonder – where is the rest of it? Where is the proposal?? Given the breadth of experience and awards discussed – why aren't we getting more to decide?

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Dominion Digital, Inc. dba WayPath  
DATE: June 6, 2022  
EVALUATOR NAME: Emma Burke  
EVALUATOR DEPARTMENT: Maine Ethics Commission

\*\*\*\*\*

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**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: Multiple state agencies as clients, in three different states
  - Project History
    - Project One – Virginia Division of Legislative Services
      - P: Lobbyist reporting site
      - N: Short description without much detail
    - Project Two – South Carolina Office of Regulatory Staff
      - P: Site for utility providers that allows them to register and make payments; automation features to reduce repetitive tasks on the users
      - N: Not much specific detail
    - Project Three – Virginia Department of Transportation
      - P: Aware winning system; sounds very robust; strong public facing part of the website; ahead of schedule and under budget; enhanced it into a tort claims system as well
  - Personnel on Project/Business Info
    - P: No subcontracting
    - I: 'Consulting firm organized primarily around technical solution offerings'
    - Q: Are there potential drawbacks for using a company that is focused more on consulting than development? Considering the specificity of our proposal, why can they not list the individuals most likely to be included on the team? Why not share financial viability info?
    - N: There should be a team in mind already if the company were to receive the winning bid; no sharing of financial viability info
  - Proposed Services
    - P: Reduce repetitive tasks; mention of them being responsible for testing; understands the clear differences between filer users and MEC admin users; can be used with mobile browsers; strong notifications system; robust reporting and dashboard capability; canned and ad-hoc reports available; includes screenshot; detailed project timeline
    - Q: How involved is learning the Dynamics 365 software? If we have to use it create reports, it cannot be too time consuming, and something that can be easily learned by incoming staff; How much testing will need to be done by MEC staff?
    - N: There seems to be a lot of 'will' statements instead of 'how' statements - I am concerned this proposal is missing technical detail that would leave me more confident that they could build us the system we need; 6+ months to release date

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Dominion Digital, Inc. dba WayPath

**DATE:** June 6, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

- Overall notes:
  - P: Dynamics 365 seems promising, and they have experience working with lobbying sites, and are aware of user concerns we would have, like ease of use of the site
  - N: I feel like there was not enough specific detail as to how Dynamics 365 would work for us, and why it would work. I am left concerned the scope of the project is not quite understood.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Dominion Digital, Inc. dba WayPath  
**DATE:** June 6, 2022  
**EVALUATOR NAME:** Jonathan Wayne  
**EVALUATOR DEPARTMENT:** Ethics Commission

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***Organization Qualifications and Experience***

<i>Overview of Organization</i>	<i>P</i>
<i>Subcontractors</i>	<i>P</i>
<i>Organizational Chart</i>	<i>P</i>
<i>Litigation, financial viability, COI</i>	<i>P</i>

***Proposed Services***

<i>Functional requirements</i>	<i>N</i>
<i>Wire frames</i>	<i>N (incomplete)</i>
<i>Features of system</i>	<i>Mix of P and N</i>
<i>Availability</i>	
<i>User authentication and roles</i>	
<i>External system integrations</i>	
<i>Data collection</i>	
<i>Save partially completed data</i>	
<i>Status tracking and reporting</i>	
<i>Reporting</i>	
<i>Legacy data conversion</i>	<i>Unclear</i>
<i>User training and documentation</i>	<i>N</i>
<i>Technical Requirements</i>	<i>Mix of P and N</i>
<i>Project Management and Work Plan</i>	<i>P</i>
<i>Quality Assurance and Acceptance</i>	<i>N</i>
<i>Implementation</i>	<i>P</i>
<i>Support and Maintenance</i>	<i>P</i>

*Overall comment: proposal does not specifically address functional requirements. Regrettably, most topics are covered in a general fashion. May be worth seeking additional information from vendor if allowed.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Dominion Digital aka Waypath

DATE: 6/6/22

EVALUATOR NAME: Diana Olore

EVALUATOR DEPARTMENT: IT

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- 20+years
- Government Experience
- Lobbyist system experience for Virginia

**2. Subcontractors**

- Not used

**3. Organizational Chart – Cross functional org chart provided**

**4. Litigation – none**

**5. Financial viability – Not provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

Not all sections of RFP addressed

**Features of the Lobbyist Public Disclosure system**

Dynamics 365 is a flexible and configurable platform

Allows for customer facing portals – mobile friendly

Flexible security model

**Legacy Data conversion**

KingswaySoft “SSIS Integration Toolkit for Microsoft Dynamics 365”

Not clear how the tool will be used, or the amount of conversion planned

**User training and documentation**

State that a training plan will be provided

**Technical Requirements**

Microsoft Dynamics 365 CRM platform

Very high level architecture diagram

Web APIS

Propose using Microsoft Azure Government Cloud, managed by MaineIT

**Project Management and Work Plan**

Agile Scrum and industry project management best practices

Cross-functional teams

**Quality Assurance and Acceptance**

Not addressed

**Implementation**

Not specifically addressed

**Support and Maintenance**

Support includes fixing bugs and minor enhancements

Regular business hours

MEC point of contract for vendor

Major enhancements will require separate contract

**Appendix F - Functional Requirements**

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Dominion Digital aka Waypath

DATE: 6/6/22

EVALUATOR NAME: Diana Olore

EVALUATOR DEPARTMENT: IT

No specific detail relating to individual requirements

**Wireframes**

Public Search page and Lobbyist registration page provided

**Implementation – Work plan**

25 weeks -

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Dorger  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience - Experience in this area – MS LOB, and other government. Offering the Valence CRM app as the best option for us, which is configurable.
  
- Proposed Services
  - Positive feeling about this one – they have good solid responses to our RFP
  - Can already support payments and LDs in their application
  - Offering follow me tutorials and PDFs, which is great for our users.
  - They appear to have considered our needs in the RFP and how they can potentially customize Valence for us.
  - Easy to read/understand RFP
  - Q – what’s the workplan? Do not see one in the RFP.
  - Wireframes provided – but not the ones we asked for unfortunately.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Dorger Software Architects, Inc.  
DATE: June 2, 2022  
EVALUATOR NAME: Emma Burke  
EVALUATOR DEPARTMENT: Maine Ethics Commission

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\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: Much experience in eGovernment solutions, including a lobbyist system
    - N: Small team
    - Q: How do we know that Valence would work for us?
  - Project History
    - Project One – Louisiana Public Service Commission
      - P: Implemented its flagship software, Valence, for a dockets, filing, orders, etc., tracking website, that has a public portal for searches and online filings
      - N: Short description without much detail
    - Project Two – Mississippi Board of Dental Examiners
      - I: The Valence software seems interesting but I haven't yet seen a description of how robust it can be and has been
    - Project Three – Mississippi Secretary of State
      - Q: It sounds like Dorger did not develop this site, but only maintains it?
      - N: Very little detail given
  - Personnel on Project
    - P: No subcontracting
    - N: Small team without a lot of development creation outside of Valence; use of humor in proposal instead of helpful details
  - Proposed Services
    - P: Highly configurable; charitable organization page looks promising for us; configurable dashboard also sounds very promising; Valence grid widget seems like it could be very useful; I like the idea of 'follow-me tutorials';
    - Q: What is meant by the public portal can be stand alone? That seems concerning to me. Are Simple Forms meant to be used by agency staff? How much would be required of the MEC staff to use the configurable dashboard widgets? How much testing would be required by the end user? Dorger says it is 'IDEAL' for the end user to be part of the process of development and testing, but it could be too much on MEC staff. Are lobbying clients only contacts in the system? It seems they should be more of an entity than that?
    - I: The workflow engine seems very interesting and could potentially keep domino effects from happening, perhaps
    - N: Simple forms seems like too much work on MEC staff; no answer or comment on to how to import bill numbers and titles from the Legislature; many different platforms for tracking the project; it appears that MEC staff will be doing the majority of the testing which is not something we can accommodate

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Dorger Software Architects, Inc.

**DATE:** June 2, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

- Overall notes:
  - P: Valence seems like potentially promising software, and Dorger clearly has some experience with lobbying work so the lexicon and typical requirements should be easily understood by the team
  - Q: How much of the actual form creation is left to MEC staff? I am concerned it is a lot. There is only one person who would be doing this with MEC.
  - N: I am left feeling like I don't have enough detail, where much of their comments on how they will configure Valence will be in the price quote, which is unavailable to me right now. Overall I am left with concerns about how Valence looks outdated in the screenshots provided, and how MEC staff heavy a lot of the development will be.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Dorger Software Architects, Inc.

**DATE:** June 6, 2022

**EVALUATOR NAME:** Jonathan Wayne

**EVALUATOR DEPARTMENT:** Ethics Commission

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***Organization Qualifications and Experience***

*Overview of Organization* P

*Subcontractors* P

*Organizational Chart* P

*Litigation, financial viability, COI* P

***Proposed Services***

*Functional requirements* P

*Wire frames* *Wire frames were somewhat helpful but not what we requested*

*Features of system* P

*Availability*

*User authentication and roles*

*External system integrations*

*Data collection*

*Save partially completed data*

*Status tracking and reporting*

*Reporting*

*Legacy data conversion* P

*User training and documentation* P

*Technical Requirements* P

*Project Management and Work Plan* P

*Quality Assurance and Acceptance* P

*Implementation* P

*Support and Maintenance* P

*Overall comment: Search results based on grid. What is difference between acknowledged and compliant?*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Dorger  
DATE: 6/7/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Government Experience
- Lobbyist system experience (Mississippi)
- Propose using Valence system and customizing

**2. Subcontractors**

- Not used

**3. Organizational Chart - Provided**

**4. Litigation – none**

**5. Financial viability – Provided**

**6. Certificate of insurance – Provided**

**II. Proposed Services**

**Services to be Provided:**

Followed format of RFP, made easier to evaluate

Proposed solution uses Valence Software, 3 applications

Layered architecture

Business processes can be added and modified without changing system code

Highly customizable, configurable widgets can be used to match the look and feel of state website

**Features of the Lobbyist Public Disclosure system**

Hosted at Amazon web services

Functional requirements that are not in the base tool are included in scope and in the proposed budget

**Legacy Data conversion**

Included

**User training and documentation**

Prefer web-based training that can be recorded and made available online

**Technical Requirements**

Most items state will comply, with additional information added only to clarify specific points

Did not address data ownership

Suggest use of sub-domain for URL

**Project Management and Work Plan**

Overview of Project management satisfactory

No workplan or timeline provided

**Quality Assurance and Acceptance**

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Dorger

DATE: 6/7/22

EVALUATOR NAME: D. Olore

EVALUATOR DEPARTMENT: DAFS/MaineIT

No detail provided

**Implementation**

No detail provided

**Support and Maintenance**

No detail provided

**Appendix F - Functional Requirements**

Bidder has indicated where functionality is already built in and where it will be configured. All configurations are included in the project scope and price

10 canned reports included in price

**Wireframes**

Sample screens were provided, though they are not the specific ones asked for

**Implementation – Work plan**

Not provided. No mention of how long the project will take.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Integral Financial Technology  
**DATE:** June 7, 2022  
**EVALUATOR NAME:** Jonathan Wayne  
**EVALUATOR DEPARTMENT:** Ethics Commission

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**Organization Qualifications and Experience**

<i>Overview of Organization</i>	<i>P (private exp mostly)</i>
<i>Subcontractors</i>	<i>Need to explore/discuss risks (limited to minor UI?)</i>
<i>Organizational Chart</i>	<i>P</i>
<i>Litigation, financial viability, COI</i>	<i>P</i>

**Proposed Services**

<i>Functional requirements</i>	<i>Intended to be addressed through wireframes. Should we confirm whether all func. req'ts will be met?</i>
<i>Wire frames</i>	<i>P+ (but how do we know we will like UI?)</i>
<i>Features of system</i>	<i>Not explicit on all points, but mostly P</i>
<i>    Availability</i>	
<i>    User authentication and roles</i>	
<i>    External system integrations</i>	
<i>    Data collection</i>	
<i>    Save partially completed data</i>	
<i>    Status tracking and reporting</i>	
<i>    Reporting</i>	
<i>Legacy data conversion</i>	<i>N</i>
<i>User training and documentation</i>	<i>N</i>
<i>Technical Requirements</i>	<i>Mix of P and N</i>
<i>Project Management and Work Plan</i>	<i>P</i>
<i>Quality Assurance and Acceptance</i>	<i>Not explicit</i>
<i>Implementation</i>	<i>P</i>
<i>Support and Maintenance</i>	<i>Addressed (only 15 hours annual, plus bug fixes)</i>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Integral  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience - Has been working on the MA CFR program since 2018. Subcontractor in India, we've had issues with communicating with overseas developers in the past. Q – it isn't clear how their order management system experience is applicable to this project. Will bring in MA consultant Grimes who worked for MA Ethics in past.
  
- Proposed Services
  - P – aggregate spending by lobbyists and bill.
  - Easy to navigate and understand wireframes, but not what we asked for to help us evaluate.
  - Simple solution, good ideas here, but doesn't seem to be a complete proposal.
  - Didn't follow the RFP format requested, so it was a bit harder to review this one.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Integral Financial Technology, Inc.  
**DATE:** June 6, 2022  
**EVALUATOR NAME:** Emma Burke  
**EVALUATOR DEPARTMENT:** Maine Ethics Commission

\*\*\*\*\*

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**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: Will engage Albert Grimes as consultant - lead developer at Mass's OCPF; projects include OCPF's flagship e-filing site; automated letters; registered filers browser; robust transaction search
  - Project History
    - Project One – GMO
      - P: Full development and deployment of front-to-back office processes; real time compliance checks
      - N: Unfortunately hard to understand how this would relate to our project
    - Project Two – William Blair
      - P: Appears to describe a detailed and complex website relating to financial information
      - N: Unfortunately hard to understand how this would relate to our project
    - Project Three – Massachusetts Office of Campaign and Political Finance
      - P: Fully functioning campaign finance e-filing system, with Albert Grimes being the sole developer/designer; almost constant uptime; ad-hoc reports; understands different filers and users; auto-fills and exports;
      - Not seeing anything about lobbying activity
  - Personnel on Project/Business Info
    - P: Albert Grimes; very experienced team
    - I: It appears this would be the first time outside of Mass that this group would be doing anything campaign finance based
    - Q: Did Integral actually have the Mass project as theirs? Or was it AI's and it's AI's project history? Is this AI's first time working with Integral?
    - N: Subcontracting outside of the US; looks like developers would all be subcontracted to India
  - Proposed Services
    - P: Three landing pages based on type of user; dashboards for filers and admins; mobile friendly with ability to file from phone; multiple types of training available; home page mockup is gorgeous; project duration is 12 weeks; wire frames make a lot of sense and anticipate our needs; mock ups of pages are excellent; can email late notices directly from profile page of lobbyist
    - Integral clearly did their research on Maine, using real Maine pictures, Maine lobbyists, and Maine clients
    - Q: Is user acceptance testing different from bug testing? Will the system be thoroughly tested for functionality before being sent to us?

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** Integral Financial Technology, Inc.

**DATE:** June 6, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

- N: During the user acceptance phase, communications are via email or phone, not something that is more organized and memorable; MEC will be responsible for user acceptance testing
  
- Overall notes:
  - P: Thoroughly impressed with the mock-ups and the understanding of what we are looking for. Just a 'wow' proposal for me. Having Al Grimes on board seems like it would be a huge benefit to us.
  - N: Worried about communication with them, the lack of previous experience with lobbying sites outside of Al Grimes, and the brunt of testing on us (me).

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Integral Financial Tech  
DATE: 6/7/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*  
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\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Government Experience
- Campaign finance experience
- Bringing in expert (Albert Grimes) to consult as SME
- Microsoft Azure hosted
- R7 project contains many features MEC is looking for
- "Instead of using off-the-shelf software and forcing MEC to use software not meant or optimized for MEC's workflow, we feel its better to build an application around MEC's workflow, optimized to meet its needs, keep the learning curve short and flat and simplify the workflow."

**2. Subcontractors**

- Fundatec Systems, Pune, India will be used for custom development

**3. Organizational Chart - Provided**

**4. Litigation – none**

**5. Financial viability – Balance sheets provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

Proposal deviates from format of RFP, so not easy to see what is not included  
Not all RFP sections explicitly addressed  
Microsoft Azure cloud-based solution  
Three parts: public section, lobbyist/filer section, MEC administration section  
Minor interface work may be done by offshore resources

**Features of the Lobbyist Public Disclosure system**

Vendor chose not to respond to requirements in RFP format, rather, they built wire-frames showing much of the functionality

**Legacy Data conversion**

In scope

**User training and documentation**

High level information provided

**Technical Requirements**

Application code stored in central Git source code repository managed with Azure DevOps, uses CI/CD pipelines

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

**BIDDER NAME:** Integral Financial Tech

**DATE:** 6/7/22

**EVALUATOR NAME:** D. Olore

**EVALUATOR DEPARTMENT:** DAFS/MaineIT

.NET 6/ASP .NET Core

Technical Architecture diagram provided

**Project Management and Work Plan**

PM methodology not detailed out, though principal resources have strong PM experience

Timeline included

**Quality Assurance and Acceptance**

Propose UAT start early in project.

Not much detail included

**Implementation**

Not much detail included

**Support and Maintenance**

Annual allotment of 15 person days to cover small enhancements

Bugs/defect fixes in initial solution done free of charge

Helpdesk support 8-5

SLA Response times are good

**Appendix F - Functional Requirements**

Instead of using RFP format to indicate included requirements, vendor opted to build screen layouts showing most functionality.

**Wireframes**

Diagrams showing the three core sections provided

All the major screens in each section provided

**Implementation – Work plan**

22 weeks, 10 2-week sprints

Solution is being built as a Software as a Service and hosted on Microsoft Azure

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Maplight  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - Positive vibes about this proposal.
  - Experience with Denver, CO LOB system, and CA SOS experience. Management of congressional bill system, examples of other systems were explained how they applied to us.
  - Strong letters of reference give a sense how they would be to work with.
  - Q – What is the plan for the subcontractors?
  
- Proposed Services
  - Solution is their off the shelf, but they've clearly thought about how to customize for MEC.
  - I like the wireframes provided, clear and easy to understand.
  - Has a fine tracking system included.
  - P – well thought out proposal, that followed the RFP making it easy to read!
  - It sounds like their program can do (or be customized) to do everything we need it to do.
  - Interesting – they fix bugs forever? at no cost. I haven't seen this before.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: MapLight  
DATE: June 6, 2022  
EVALUATOR NAME: Emma Burke  
EVALUATOR DEPARTMENT: Maine Ethics Commission

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: Civic technology organization that makes lobbyist and campaign finance disclosure websites; believes their currently lobbyist disclosure solution matches what we need closely; they state they are experts in understanding and conveying the meaning of lobbying and government ethics data; disclosure software is their focus; federal lobbying data disclosure site
    - I: 501c3 with a mission of improving transparency for government information; has won multiple awards
  - Project History
    - Project One – City and County of Denver, Colorado
      - P: Comprehensive software system for lobbying, ethics, and campaign finance filing and disclosure
      - I: Feels what we need would closely match this system; includes letter of reference
      - N: Very little detail in the project history explanation
    - Project Two – California Secretary of State
      - P: Campaign finance disclosure software for the State of California
      - I: Includes letter of reference
      - N: Essentially no detail in project history explanation
    - Project Three – League of Women Voters of California
      - P: Voter's Edge online information guide for voters; robust search feature with multiple returned data points; brings in campaign finance data; can handle 3 million page hits in a day
      - I: Letter of reference included
  - Personnel on Project/Business Info
    - P: Laura Curlin's experience and history are great matches for what we need
    - N: Subcontracting
  - Proposed Services
    - P: Public portal, filer interface, and admin interface; detailed responses to all functionality questions - all answers are positive unless mentioned in Q or N below; configurable calendar; in-app messaging; penalty module; in-place error checking; will test all aspects before production
    - Q: 'Users can Save an Activity Report to resume later. Submit or File files the report and makes the information available to the public and in the Event Log. In the current configuration, the report as displayed on screen is how the report would be seen as a PDF, but if there is a difference between those views, a Preview option

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** MapLight

**DATE:** June 6, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

can be configured.' Does this mean that lobbyists could enter information, and if they don't click save, they could lose their information? Why wouldn't preview be a default option?

- N: 'The Non-Session Waiver will be configured to have an option to unfile the waiver in the Event Log. The Unfile PDF will be available in the Event Log and in the public Lobbyist-Client Registration Page Filings section.' I don't like the idea of the Event log having actions in it, as it is a log and should be for display purposes only; Go Live date is quite a bit past what we would want it to be
- Overall notes:
  - P: Thoroughly impressed with the mock-ups and the understanding of what we are looking for. Overall a very strong proposal that leaves me feeling confident in the services we would get from MapLight
  - N: Concerned about the timing of the project, the weight of use of the event log, and what appears to be hesitancy to adopt automatic saving and the need for a preview option.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Maplight  
**DATE:** June 7, 2022  
**EVALUATOR NAME:** Jonathan Wayne  
**EVALUATOR DEPARTMENT:** Ethics Commission

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**Organization Qualifications and Experience**

<i>Overview of Organization</i>	<i>P, but with questions</i>
<i>Subcontractors</i>	<i>Need to explore/discuss risks</i>
<i>Organizational Chart</i>	<i>P</i>
<i>Litigation, financial viability, COI</i>	<i>P (statement on litigation is qualified)</i>

**Proposed Services**

<i>Functional requirements</i>	<i>P (states all requirements will be satisfied)</i>
<i>Wire frames</i>	<i>P+ (is the UI same as wireframes?)</i>
<i>Features of system</i>	<i>P</i>
<i>Availability</i>	
<i>User authentication and roles</i>	
<i>External system integrations</i>	
<i>Data collection</i>	
<i>Save partially completed data</i>	
<i>Status tracking and reporting</i>	
<i>Reporting</i>	
<i>Legacy data conversion</i>	<i>Referenced</i>
<i>User training and documentation</i>	<i>P</i>
<i>Technical Requirements</i>	<i>P (specifically addressed)</i>
<i>Project Management and Work Plan</i>	<i>P</i>
<i>Quality Assurance and Acceptance</i>	<i>P</i>
<i>Implementation</i>	<i>P</i>
<i>Support and Maintenance</i>	<i>P</i>

*Other comments: only applications are Denver and CA SoS. Why only two clients if this is their specialty? What other work do they do? Can we get other examples? Project managers would be Laura Curlin and Don Shannon. May need to explore scope of subcontractor's work. Will configure maplight disclosure system. Public access site for Denver lobbyist disclosure is limited. CF is better.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Maplight  
DATE: 6/7/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

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\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Government Experience
- Civic Technology Organization
- Existing lobbyist disclosure solution will be used as basis for MEC – Maplight Disclosure system
- Will customize the Off the shelf existing solution to exactly meet MEC specifications
- 2 Projects listed were lobbying, ethics, and campaign finance filing and disclosure, 1 was for online voter information, though bidder explained why this project was relevant from a technology point of view
- Good references

**2. Subcontractors**

- NTSprint, LLC

**3. Organizational Chart – Provided, along with resumes of principal resources**

**4. Litigation – none**

**5. Financial viability – Balance sheets provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

Followed format of RFP

Proposed using the existing, off-the-shelf MapLight Disclosure System, configured to meet MEC's specific needs.

**Features of the Lobbyist Public Disclosure system**

The Bidder asserts that the MapLight Disclosure system meets all of the feature requirements in the RFP.

Notes were added to the detailed requirements to show what is base functionality, and what could be configured.

**Legacy Data conversion**

Addressed

**User training and documentation**

Addressed

**Technical Requirements**

All technical requirements addressed

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Maplight

DATE: 6/7/22

EVALUATOR NAME: D. Olore

EVALUATOR DEPARTMENT: DAFS/MaineIT

Three architectural models showing different aspects of system provided and explained  
MapLight Disclosure System is a fully hosted Software as a Service application  
Hosted in Microsoft Azure high-availability implementation  
Angular JS, JSON, AJAX  
Device-independent  
CI/CD deployment (GitHub)

**Project Management and Work Plan**

Hybrid waterfall project management with Agile development approach

Good overview of PM process

**Quality Assurance and Acceptance**

Good overview of testing processes

**Implementation**

Good high-level plan provided

**Support and Maintenance**

24/7 self-service

All issues tracked

Response times good – 15 min for critical

200 hours annual allowance towards maintenance, development, and support services

Defects resolved at no additional charge for life of agreement

**Appendix F - Functional Requirements**

Notes were added to the detailed requirements to show what is base functionality, and what could be configured.

Additional functionality that is included at no extra cost includes: API for public data sharing, Configurable calendar with public display, In-application messaging, and a Fines, fees, and invoices module.

There is also an optional Multiple language functionality

**Wireframes**

Provided

**Implementation – Work plan**

5 month (21 weeks) duration

Timeline provided

Deliverables and major milestones provided

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Pacific Point  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - HI LOB system
  - No subcontractors
  - Offering a Salesforce program solution
  - N- seems to be a long pitch for the Salesforce program, which is unnecessary and avoids keeping the proposal to responding to the requests of our RFP.
  
- Proposed Services
  - N – lots of generalities about the Salesforce program, not really digging into the solution that MEC needs, making it harder to evaluate.
  - Mar 23 launch
  - Q - The cost is determined by the total number of users? This is different than how our current program works, is that typical? (Sec 4.3.2.18.3)
  - Q – are they not available to assist in the future? It sounds like they want to give us the product and then leave it to us, which I'm not sure we have the tech knowledge for so that is concerning to me for our office.
  - Proposal seems promising at first, but this doesn't confirm to what we requested in the RFP and provide a clear solution to what MEC needs for this project.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Pacific Point, Inc.  
DATE: June 6, 2022  
EVALUATOR NAME: Emma Burke  
EVALUATOR DEPARTMENT: Maine Ethics Commission

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: Public sector experience with recognition from *Inc.*, high level experience, built Hawaii's lobbyist disclosure solution
    - I: Pledge 1% movement
  - Project History
    - Project One – State of Hawaii Ethics Commission
      - P: Implemented the reporting and disclosures website for the Hawaii Ethics Commission and provides on going support
      - N: Little detail given
    - Project Two – State of Hawaii Commerce and Consumer Affairs
      - P: Large number of solutions including payments, filing, etc. type tools, and also include public search functions
    - Project Three – Department of Hawaiian Homelands
      - Q: What kind of agency is Hawaiian Homelands? It is hard to tell how similar of a project this would be to ours with so little explanation
      - I: Seems to be able to handle a large case load with interactive functionalities. Not putting under P because so little detail is given.
  - Personnel on Project/Business Info
    - P: Detailed org chart, really helpful to understand who will play what roles; finances are very good
    - N: Typos; not a lot of details on the individuals until proposed services
  - Proposed Services
    - P: Full mobile access; the different types of reports sound awesome; LOVE the client expectations table; user requests for support tool; great detail on support offered for what level of issue
    - Q: Would our price quote perhaps not be accurate? What are the methods of training? Other than a PowerPoint?
    - N: Weekly backup does not seem like enough; seems like a heavy lift for testing on MEC end
    - I: Salesforce platform; Parking lot backlog; not sure how I feel about the MVP idea
- Overall notes:
  - P: Thoroughly impressed with this proposal, the level of detail given, and the comments on each functionality. I was left with the impression they would give us a workable solution.
  - N: Concerned about the heavy lift of MEC staff.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** Pacific Point  
**DATE:** June 13, 2022  
**EVALUATOR NAME:** Jonathan Wayne  
**EVALUATOR DEPARTMENT:** Ethics Commission

---

***Organization Qualifications and Experience***

<i>Overview of Organization</i>	<i>P</i>
<i>Subcontractors</i>	<i>P</i>
<i>Organizational Chart</i>	<i>P</i>
<i>Litigation, financial viability, COI</i>	<i>P</i>

***Proposed Services***

<i>Functional requirements</i>	<i>P</i>
<i>Wire frames</i>	<i>Insufficient</i>
<i>Features of system</i>	<i>P</i>
<i>    Availability</i>	
<i>    User authentication and roles</i>	
<i>    External system integrations</i>	
<i>    Data collection</i>	
<i>    Save partially completed data</i>	
<i>    Status tracking and reporting</i>	
<i>    Reporting</i>	
<i>Legacy data conversion</i>	<i>P</i>
<i>User training and documentation</i>	<i>P</i>
<i>Technical Requirements</i>	<i>Mix of P and N</i>
<i>Project Management and Work Plan</i>	<i>P</i>
<i>Quality Assurance and Acceptance</i>	<i>Mix of P and N</i>
<i>Implementation</i>	<i>P</i>
<i>Support and Maintenance</i>	<i>P</i>

*Other comments: qualifications section was well organized, but too much description of sales force. Good business track record. Org chart good. Wire frames are not satisfactory. Don't demonstrate understanding of functional requirements. Very concerned about shifting of workload to MEC staff with limited staff time and non-technical background.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: Pacific Point  
DATE: 6/8/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Government Experience
- Lobbyist system experience
- Silver Salesforce Consulting

**2. Subcontractors**

- Not used

**3. Organizational Chart - Provided**

**4. Litigation – none**

**5. Financial viability – Balance sheets provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

Mostly followed format of RFP

Recommended products: Salesforce Platform Cloud, Salesforce Experience Cloud, Formstack

**Features of the Lobbyist Public Disclosure system**

RFP followed closely in this section

Some items only contained links to external sources of information

**Legacy Data conversion**

Bidder will provide xls templates for MEC to prepare data for load

**User training and documentation**

Instructor led and recorded for future use

Salesforce has extensive training on demand

Vendor will prepare One PowerPoint presentation and an associated Word Document.

**Technical Requirements**

No technical architecture diagram provided because Salesforce is hosted in the cloud

Bidder does work in client's Salesforce so the Salesforce and Formstack subscriptions need to be secured and in place to start implementation

**Project Management and Work Plan**

Hybrid Agile project methodology

Project Governance and team structure provided with key resources identified

Client resource roles and responsibilities provided

**Quality Assurance and Acceptance**

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: Pacific Point

DATE: 6/8/22

EVALUATOR NAME: D. Olore

EVALUATOR DEPARTMENT: DAFS/MaineIT

Vendor will provide data loading and conversion templates for client to complete

Writing UAT test scripts is out of scope

States that Client tests the system and logs bugs with detailed results, It is assumed, though not stated, that vendor will test before this stage

**Implementation**

Key activities identified

**Support and Maintenance**

“The Client Salesforce Administrator is someone who is positioned to eventually take on administrative support of the solution and begin learning Salesforce in preparation for post-go live support”

“Our support goal is to enable the MEC to be self-sufficient and leverage the support available with your Salesforce Premier Support, only leveraging our team when highly technical issues arise”

Support is based on hourly budget per term (40 hours per month), unused hours roll forward.

Additional support is time and materials based

Salesforce Premier support included in cost proposal

Response time for critical issues. 1 hour

Severity 1 and 2 coverage includes weekends and holidays

**Appendix F - Functional Requirements**

All requirements were addressed by indicating whether the functionality already exists, is configurable, or needs to be customized

10 automated emails included

**Wireframes**

Provided sample screens, but did not use MEC fields.

**Implementation – Work plan**

Initial implementation (MVP) will focus on requirements provided in RFP.

7 month timeline

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** RFD & Associates  
**DATE:** June 13, 2022  
**EVALUATOR NAME:** Jonathan Wayne  
**EVALUATOR DEPARTMENT:** Ethics Commission

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***Organization Qualifications and Experience***

<i>Overview of Organization</i>	<i>P</i>
<i>Subcontractors</i>	<i>P</i>
<i>Organizational Chart</i>	<i>P</i>
<i>Litigation, financial viability, COI</i>	<i>P</i>

***Proposed Services***

<i>Functional requirements</i>	<i>P</i>
<i>Wire frames</i>	<i>Good but not great</i>
<i>Features of system</i>	<i>P</i>
<i>Availability</i>	
<i>User authentication and roles</i>	
<i>External system integrations</i>	
<i>Data collection</i>	
<i>Save partially completed data</i>	
<i>Status tracking and reporting</i>	
<i>Reporting</i>	
<i>Legacy data conversion</i>	<i>Note cost</i>
<i>User training and documentation</i>	<i>P</i>
<i>Technical Requirements</i>	<i>P (no explanation or detail). General statement all req's met.</i>
<i>Project Management and Work Plan</i>	<i>P</i>
<i>Quality Assurance and Acceptance</i>	<i>P</i>
<i>Implementation</i>	<i>P</i>
<i>Support and Maintenance</i>	<i>P</i>

*Other comments: Good business history. TX and Austin municipal government experience is a plus. Showed understanding of users of site. Would build new system for us. All functional req'ts met stated, but responses to req'ts just say to be developed. No further detail or explanation provided. Up to \$150,000 for data conversion. Suggest vendor for penetration testing.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: RFD  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - 36 years of public/private clients at all levels
  - TX efilng system for CAN/LOB (2,000 reg lobbyists) since 2013
  - Q – not clear how the Maximus project experience applies to MEC project.
  - In-House LOB experience
  - Full resumes of team provided – this level of detail wasn't necessary; paragraphs would've been fine.
  
- Proposed Services
  - They're not a product company, and would customize a app for us.
  - N/Q – 100 max for data conversion – not sure if that is not enough or too much, but what if it runs over??
  - P - They've thought through solutions to our problem.
  - Q – what is the data recovery plan?
  - Q – Acceptance section says they'll provide pricing for penetration testing separately – so that means the figures in the quote aren't complete.
  - N – they propose a different contract term than what we want.
  - Want to implement in April 23, which seems much later than we'd like since we'll be well into the new lobbying year at that point.
  - P – wireframes are clean, easy to understand, and easy to navigate.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: RFD & Associates, Inc.  
DATE: June 13, 2022  
EVALUATOR NAME: Emma Burke  
EVALUATOR DEPARTMENT: Maine Ethics Commission

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**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: More than 36 years of serving government clients, Texas Ethics Commission's e-filing system; really well written
  - Project History
    - Project One – Texas Ethics Commission
      - P: Understands the difference between large, sophisticated campaigns and then 'low-volume' filers who probably need more help
      - I: City of Austin has a municipal level of this site
      - Q: 'Recent deployment' was mentioned in the overview, but this says the project started in 2013 – how long did it take?
    - Project Two – MAXIMUS
      - P: Has the same system set up in multiple states and can be configured on their needs
    - Project Three – MAXIMUS
      - N: Very little detail on the service actually offered here
      - Q: Is high volume file transfers all they do here?
    - Project Four – Texas General Land Office
      - I: Appears they came in and saved at an risk project due to vendor incompetence
  - Personnel on Project/Business Info
    - P: Detailed org chart, really helpful to understand who will play what roles; very good financials; No subcontracting
    - I: Attached resumes
  - Proposed Services
    - P: AWS cloud services; 'interview-guided' style of application; mock ups are well done and helpful
    - Q: Why do we need a testing vendor? Is that even possible for us?
    - N: Only partial data can be saved; 'to be developed' on each functionality is not reassuring or detailed; Timeline appears to give us VERY short turn around time for approving measures; RFD would own the intellectual property
    - I: 'not a "product" company'; does not have an existing product to sell or adapt, will custom build based on experience
- Overall notes:
  - P: Overall impressed with the experience and detail given in some areas. We could probably get what we need from RFD

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** RFD & Associates, Inc.

**DATE:** June 13, 2022

**EVALUATOR NAME:** Emma Burke

**EVALUATOR DEPARTMENT:** Maine Ethics Commission

- N: Concerned about the presumed need for penetration testing and a testing vendor; concerned about the estimate of 100 hours needed of data conversation; I am worried they don't understand the scope of our project.

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: RFD  
DATE: 6/13/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*  
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\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Government Experience
- Campaign finance and lobbyist experience
- Texas Ethics Commission
- Maximus Employer Services Portal (ESP) ← will be foundation for proposed system

**2. Subcontractors**

- None planned,

**3. Organizational Chart – Provided, Resumes for key personnel provided. Strong ethics systems experience.**

**4. Litigation – none**

**5. Financial viability – Balance sheets provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

All sections of RFP addressed

Not a 'product' company. Propose developing a system similar to other lobbyists systems they have created

To be built and run 100% in the AWS Cloud using native cloud capabilities

Configurable features and façade-based integration, leveraging discrete serverless components  
Will take advantage of cloud native capabilities including autoscaling, AWS security instrumentation, monitoring tools, Cognito (identity management), Cloudfront (managed content delivery network), application load balancer, Lambda (managed serverless architecture) , Aurora PostgreSQL, SeS (managed email service), EFS (auto-scaling network storage service)

**Features of the Lobbyist Public Disclosure system**

“RFD will develop a system that meets all of the functional requirements in Appendix F.”

Functionality is similar to systems developed and implemented for other clients

Bidder acknowledged that they will comply with all features listed, adding detail for clarification in several sections

**Legacy Data conversion**

“Until further clarity is achieved, RFD’s proposal includes a maximum of 100 hours for data conversion analysis and development”

**User training and documentation**

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: RFD  
DATE: 6/13/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

Agrees and will comply

**Technical Requirements**

High level Architecture, Application Architecture, and High Availability diagrams included  
Most areas were acknowledged with “agrees and will comply”, some additional detail includes:  
1 employee in Canada that they would like to use if possible,  
bidder will dedicate up to 40 hours/year supporting SOC2 Type II audits, but does not agree to procure those services separately  
Current systems in AWS cloud exceed RFP requirements  
Propose spinning down cloud environments when not needed, to drive savings

**Project Management and Work Plan**

Uses hybrid agile project management approach  
Named PM is PMP certified with experience leading ethics e-filing projects

**Quality Assurance and Acceptance**

Agrees and will comply with stated requirements  
Propose providing pricing for penetration testing separately after systdraft em architecture and scale are well established

**Implementation**

Implementation/Work plan is included (though no additional detail provided)

**Support and Maintenance**

Agrees and will comply.  
Only detail was that Upgrades will be scheduled and executed in consultation with MEC

**Appendix F - Functional Requirements**

All requirements indicate that they are “to be developed”, no additional detail added.  
Bidder did indicate that all requirements would be met  
Some pricing assumptions and exceptions to requirements were noted as follows:  
Data conversion only includes up to 100 hours  
Proposed changes to contract term  
40 hours time to support compliance activities, including SOC 2 audits  
Proposes pricing penetration tests separately  
Bidder will own intellectual property

**Wireframes**

Provided

**Implementation – Work plan**

9/1/22-4/25/23

Provides additional detail for testing and training

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060  
**RFP TITLE:** Lobbyist Public Disclosure System  
**BIDDER NAME:** WSD Digital, LLC  
**DATE:** June 13, 2022  
**EVALUATOR NAME:** Emma Burke  
**EVALUATOR DEPARTMENT:** Maine Ethics Commission

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - Statement of qualifications:
    - P: A lot of experience in serving local, state, and federal governments
  - Project History
    - Project One – New Hampshire Secretary of State
      - P: Vital records system
      - Q: It appears to be still in development? And it seems to be taking a couple of years?
    - Project Two – Nevada Secretary of State
      - No details to make notes on
    - Project Three – Vermont State Housing Authority
      - P: Appears to be a very complex, robust system that was built very quickly
  - Personnel on Project/Business Info
    - P: Detailed org chart, Anand who has Maine experience via PCC, and many of the other people have campaign finance or lobbyist disclosure website experience
    - P: No subcontracting
  - Proposed Services
    - P: AWS cloud services with good tooltips; detailed data conversion plan; thorough training plan; turn key solution; mock ups are great; will provide a thoroughly tested solution; honestly I see very few negatives in the proposed services; could get the solution by November 30, 2022
- Overall notes:
  - P: I am really impressed with the amount of detail and clear knowledge this group has of campaign finance and lobbying, and how much they anticipated we'd need without it being explicitly mention in the RFP.
  - N: I am concerned about the newness of the company and their current financial status

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202204060

**RFP TITLE:** Lobbyist Public Disclosure System

**BIDDER NAME:** WSD Digital

**DATE:** June 13, 2022

**EVALUATOR NAME:** Jonathan Wayne

**EVALUATOR DEPARTMENT:** Ethics Commission

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***Organization Qualifications and Experience***

*Overview of Organization* P

*Subcontractors* P

*Organizational Chart* P

*Litigation, financial viability, COI* P

***Proposed Services***

*Functional requirements* P

*Wire frames* Very good.

*Features of system* P

*Availability*

*User authentication and roles*

*External system integrations*

*Data collection*

*Save partially completed data*

*Status tracking and reporting*

*Reporting*

*Legacy data conversion* Problem

*User training and documentation* P

*Technical Requirements* P

*Project Management and Work Plan* P

*Quality Assurance and Acceptance* P

*Implementation* P

*Support and Maintenance* P

*Other comments: Staff looks well qualified. Ethics (CF, lobby, SFI) experience a plus. Newness of company and rapid expansion are possible risks. Attended to requirements well. Wireframes quite good. Detailed lobbyist conversion plan. Services were well described. Timeframe may not be believable. Support discussion a plus.*

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: WSD Digital  
DATE: 6/8/22  
EVALUATOR NAME: D. Olore  
EVALUATOR DEPARTMENT: DAFS/MaineIT

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

**I. Organization Qualifications and Experience**

**1. Overview of Organization**

- Young company staffed by resources with several years of SoS, Campaign finances, and lobbyist support
- Government Experience
- Staff have campaign finance and Lobbyist system experience
- Strong, experienced, team
- Propose using pre-developed core code to accelerate and shorten the delivery time frame at a reasonable cost
- Solution is designed to be configurable by the user wherever possible
- Reframe Engage Customer Engagement platform built using modern UI/UX technologies, chatbots, video chat, voice chat, text message integration, latest cloud services (auto-scaling and security).
- Currently used in 7 govt entities (3 SoS)

**2. Subcontractors**

- None Planned

**3. Organizational Chart – Provided, information about key resources provided**

**4. Litigation – none**

**5. Financial viability – Balance sheets provided**

**6. Certificate of insurance – provided**

**II. Proposed Services**

**Services to be Provided:**

All sections of RFP addressed in RFP format

“This proposal represents a turn-key solution with all development, implementation, ongoing hosting, software, and support under the current scope of the RFP provided by ReFrame Solutions”

**Features of the Lobbyist Public Disclosure system**

Proposed solution I cloud-hosted in AWS using highly available, scalable and secure environment available for 24/7/365 operation

Tooltips and configurable help system

Interface components created by applying a façade pattern and using native API

**Legacy Data conversion**

Data conversion plan included, though bidder's plan is to have solution in place early enough to avoid data conversion.

**User training and documentation**

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060

RFP TITLE: Lobbyist Public Disclosure System

BIDDER NAME: WSD Digital

DATE: 6/8/22

EVALUATOR NAME: D. Olore

EVALUATOR DEPARTMENT: DAFS/MaineIT

Thorough and comprehensive

**Technical Requirements**

Bidder has involvement in several implementations or maintenance contracts for SOM

All sections answered thoroughly and comprehensively

Several architecture diagrams showing different levels of solution provided and thoroughly explained,

ReFrame exclusively uses AWS and Azure Cloud environments for all development, repositories, resource productivity tools, communications, data storage, configuration management, hosting, and ongoing maintenance support.

Bidder is proposing AWS Cloud services with Geo-diverse replicated regions providing for appropriate RTO/RPO thresholds.

“WSDs transition and ongoing operation to a remote, cloud-native organization has provided unwavering customer service and no significant occurrence of a security, technology, or operational incident throughout the very challenging Covid-19 pandemic”

**Project Management and Work Plan**

Hybrid agile approach

Well developed and documented plan

Initial documentation will be further refined in subsequent sprints

Experienced PMP certified PM identified

**Quality Assurance and Acceptance**

Comprehensive testing plan included

**Implementation**

All project phases clearly described in PM section

**Support and Maintenance**

Bidder will retain support staff from the original implementation team at the level necessary for this solution to be fully available and usable according to an agreed upon Performance SLA, including a 90 day warranty period and extended maintenance and support based on the requirements of the RFP

Bidder will provide first-line (level 1) technical support to MEC staff via a dedicated product support team

Critical response time 4 hours

**Appendix F - Functional Requirements**

Pre-developed core solution components will be brought to the solution development iterations as-needed to avoid complete custom development, but fields, rules, workflow layouts, and other features will be configured or customized to the exact MEC requirements in Appendix F

Item-by-item affirmative acknowledgement and some additional comments provided for every requirement

**Wireframes**

Several wireframes included, covering a vast majority of RFP requirements

**Implementation – Work plan**

June 27,2022 – November 30, 2022 (5 months)

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

RFP #: 202204060  
RFP TITLE: Lobbyist Public Disclosure System  
BIDDER NAME: WSD DIGITAL  
DATE: 6/6/22  
EVALUATOR NAME: Martha Currier  
EVALUATOR DEPARTMENT: Ethics

\*\*\*\*\*

**Individual Evaluator Comments:**

- Qualifications & Experience
  - Founded 3 years ago, but CEO formerly worked for PCC, a company MEC worked with in the past. Number of experienced staffers in this young company.
  - Q – since they are new, does SOM consider them financially viable?
  - Working with ME SOS
  - Claims that staff have extensive experience with campaign finance and LOB, but these aren't outlined on their list so are we to assume this was with their SOS clients?
  
- Proposed Services
  - P – has guides for end users, which is helpful to our folks.
  - Nice wireframes – easy to read/navigate, good look/feel. Much more than we asked for in the RFP.
  - 5 months until implantation – is that enough time for them to understand thoroughly what we need and make adaptations to ReFrame program??
  - It is clear what is included with their proposal in the grids section, and it seems to me that they've thought through a solution for MEC.



STATE OF MAINE  
Maine Commission on  
Governmental Ethics and Election Practices

Janet T. Mills  
Governor

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202204060**  
**RFP TITLE: Lobbyist Public Disclosure System**

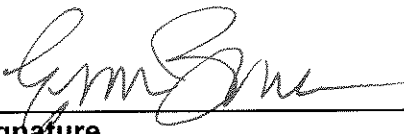
I, **Emma Burke**, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Commission on Governmental Ethics and Election Practices. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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

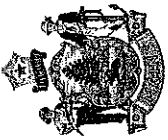
I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

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

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

  
\_\_\_\_\_  
Signature

05/26/2022  
\_\_\_\_\_  
Date



Janet T. Mills  
Governor

STATE OF MAINE  
Maine Commission on  
Governmental Ethics and Election Practices

**AGREEMENT AND DISCLOSURE STATEMENT**

**RFP #: 202204060**

**RFP TITLE: Lobbyist Public Disclosure System**

I, **Diana Olore**, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Commission on Governmental Ethics and Election Practices. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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

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

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

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

*Diana Olore*

Signature

5/26/22

Date



STATE OF MAINE  
Maine Commission on  
Governmental Ethics and Election Practices

Janet T. Mills  
Governor

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202204060**  
**RFP TITLE: Lobbyist Public Disclosure System**

I, **Jonathan Wayne**, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Commission on Governmental Ethics and Election Practices. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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

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

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

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

A handwritten signature in black ink, appearing to read 'Jonathan Wayne', written over a dashed line.

May 26, 2022

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Signature

Date



STATE OF MAINE  
Maine Commission on  
Governmental Ethics and Election Practices

Janet T. Mills  
Governor

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202204060**  
**RFP TITLE: Lobbyist Public Disclosure System**

I, **Martha Currier**, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Commission on Governmental Ethics and Election Practices. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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

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

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

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

A handwritten signature in blue ink that reads "Martha Currier".

May 26, 2022

Signature

Date