

State of Maine
RFP / Proposal Master Score Sheet

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

SCORESHEET FOR RFP# 201806133: Consulting Services – CMP Billing Case									
PROPOSAL SUBMITTED BY:		Vondle & Associates		BerryDunn		N/A		N/A	
COST:		Cost:	\$49,440	Cost:	\$59,700	Cost:	\$0	Cost:	\$0
EVALUATION ITEM	POINTS AVAIL.								
Section I: Organization Qualifications and Experience	40	28		33					
Section II: Proposed Services	25	18		24					
Section III: Cost Proposal	25	25		20					
Section IV: Maine Business and Economic Impact Consideration	10	0		8					
TOTAL	<u>100</u>	<u>(71)</u>		<u>(85)</u>		<u>0</u>		<u>0</u>	



**STATE OF MAINE
EXECUTIVE DEPARTMENT
OFFICE OF THE PUBLIC ADVOCATE**

**Paul R. LePage
Governor**

**Barry J. Hobbins
Public Advocate**

AWARD NOTIFICATION LETTER

August 9, 2018

Berry Dunn McNeil & Parker, LLC
Attn: John Chandler, Managing Principal
100 Middle Street
Portland, ME 04101

**SUBJECT: Notice of Conditional Contract Award under RFP # 201806133
Consulting Services – CMP Billing Case**

Dear Mr. Chandler:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Executive Department, Office of the Public Advocate (OPA) for Consulting Services – CMP Billing Case. The OPA has evaluated the proposals received using the evaluation criteria identified in the RFP, and the OPA is hereby announcing its conditional contract award to the following bidder:

- Berry Dunn McNeil & Parker, LLC

The bidder listed above received the evaluation team's highest ranking. The Office of the Public Advocate will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Office of the Public Advocate 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 Office of the Public Advocate is executed. The Office of the Public Advocate further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection

pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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

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

Sincerely,

A handwritten signature in cursive script that reads "Elizabeth J. Wyman". The signature is written in black ink and is positioned above the typed name.

Elizabeth J. Wyman, Senior Counsel

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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AWARD NOTIFICATION LETTER

August 9, 2018

Vondle & Associates, Inc.
Attn: David P. Vondle, CMC/President
4926 Calle de Tierra, NE
Albuquerque, NM 87111

**SUBJECT: Notice of Conditional Contract Award under RFP # 201806133
Consulting Services – CMP Billing Case**

Dear Mr. Vondle:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Executive Department, Office of the Public Advocate (OPA) for Consulting Services – CMP Billing Case. The OPA has evaluated the proposals received using the evaluation criteria identified in the RFP, and the OPA is hereby announcing its conditional contract award to the following bidder:

- Berry Dunn McNeil & Parker, LLC

The bidder listed above received the evaluation team's highest ranking. The Office of the Public Advocate will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Office of the Public Advocate 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 Office of the Public Advocate is executed. The Office of the Public Advocate 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

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Elizabeth J. Wyman, Senior Counsel

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER: Vondle and Associates, Inc.
DATE: August 8, 2018

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

DEPARTMENT NAME: Office of the Public Advocate
NAME OF RFP COORDINATOR: Liz Wyman, Senior Counsel
NAMES OF EVALUATORS: Eric Bryant, Senior Counsel, Liz Wyman, Senior Counsel

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
	<u>Pass:</u>	<u>Fail:</u>
◆		
◆		
◆		
	<u>Points Awarded:</u>	
Numerical Score:		
Section I. Organization Qualifications and Experience	(Max: 40 Points)	28
Section II. Proposed Services	(Max: 25 Points)	18
Section III: Cost Proposal	(Max: 25 Points)	25
Section IV: Maine Business and Economic Impact Consideration	(Max: 10 Points)	0
TOTAL POINTS	(Max: 100 Points)	71

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER: Vondle and Associates, Inc.
DATE: August 8, 2018

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

Total Points Available: 25 Score: 25

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
49,440	÷	49,440	x	25 points	=	25

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER: Vondle and Associates, Inc.
DATE: August 8, 2018

**EVALUATION OF SECTION IV
Maine Business and Economic Impact Consideration**

Total Points Available: 10 Score: 0

MAINE BUSINESS ANALYSIS			
	Total	Maine Resident	Maine Impact
Number of FTE Employees:	2	0	0 %
Payroll:	2	0	0 %
Average percent of MAINE BUSINESS ANALYSIS:			0 %

1-74%:	2 points
75-100%:	4 points

MAINE ECONOMIC IMPACT		
	Total amount in Maine	
Income Taxes Paid (State):	\$ 0	
Property Taxes Paid (Local):	\$ 0	
Wages to Maine Residents:	\$ 0	
Payments to Maine Subcontractors Estimated:	\$ 0	
Sum of MAINE ECONOMIC IMPACT:		\$ 0

\$1 - \$1,000,000:	2 points
\$1,000,001 - \$10,000,000:	4 points
>\$10,000,000:	6 points

0

Total Points for Maine Business and Economic Impact Consideration:	0
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER: BerryDunn McNeil & Parker
DATE: August 8, 2018

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

DEPARTMENT NAME: Office of the Public Advocate
NAME OF RFP COORDINATOR: Liz Wyman, Senior Counsel
NAMES OF EVALUATORS: Eric Bryant, Senior Counsel, Liz Wyman, Senior Counsel

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
	<u>Pass:</u>	<u>Fail:</u>
◆		
◆		
	<u>Points Awarded:</u>	
<u>Numerical Score:</u>		
Section I. Organization Qualifications and Experience	(Max: 40 Points)	33
Section II. Proposed Services	(Max: 25 Points)	24
Section III: Cost Proposal	(Max: 25 Points)	20
Section IV: Maine Business and Economic Impact Consideration	(Max: 10 Points)	8
TOTAL POINTS	(Max: 100 Points)	85

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER: BerryDunn McNeil & Parker
DATE: August 8, 2018

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

Total Points Available: 25 Score: 20

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
49,440	÷	59,700	x	25 points	=	20

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER: BerryDunn McNeil & Parker
DATE: August 8, 2018

**EVALUATION OF SECTION IV
Maine Business and Economic Impact Consideration**

Total Points Available: 10 Score: 8

MAINE BUSINESS ANALYSIS			
	Total	Maine Resident	Maine Impact
Number of FTE Employees:	378.0	220.0	58%
Payroll:	\$35,068.374	\$24,871,633	71 %
Average percent of MAINE BUSINESS ANALYSIS:			65%

1-74%:	2 points
75-100%:	4 points

MAINE ECONOMIC IMPACT		
	Total amount in Maine	
Income Taxes Paid (State):	\$ 1,408,465	
Property Taxes Paid (Local):	\$ 56,278	
Wages to Maine Residents:	\$ 24,871,633	
Payments to Maine Subcontractors Estimated:	\$ 374,420	
Sum of MAINE ECONOMIC IMPACT:		\$ 26,710,796

\$1 - \$1,000,000:	2 points
\$1,000,001 - \$10,000,000:	4 points
>\$10,000,000:	6 points

6

Total Points for Maine Business and Economic Impact Consideration:	8
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**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER NAME: Berry Dunn McNeil & Parker, LLC
DATE: August 7, 2018
EVALUATOR NAME: Liz Wyman
EVALUATOR DEPARTMENT: Office of the Public Advocate

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

Individual Evaluator Comments:

Organization
Experience with assessing vendor performance, implementation of “enterprise information systems” as well as integration and data-sharing needs – seems like it could be relevant – is there enough emphasis on forensic examination of such systems?
Worked with government agencies to audit “network and system upgrades”
“We have a team of internal experts in ... IT networks and application environments, utility billing and rate setting”
Data analysis – of “metering devices” -- “Our partner Texas Meter and Device Company” has extensive experience testing and analyzing the effectiveness of smart devices with more than 100 entities across the country – this sounds right on point
BerryDunn will lead the project supported by TMD – sounds like they partnered with TMD to get the IT expertise – this could be getting extra value from the financial and IT sides
Testing the veracity and completeness of Liberty’s work – good
The two identified leads – Julie Keim and Bill Brown – do not seem to have direct IT experience
Extensive audit experience, with governments more than utilities?
Staff who “specialize in process improvement and root cause analysis” – these are “Lean Six Sigma Green Belt” certified – not sure what this means
They do have 9 certified systems auditors – isn’t this what we need?
They worked for the MPUC in a CMP case 16-35
Table 3 lists the various information systems projects
Has a section on “Billing System Reviews and Forensic Examinations” but the description of work is general expect for four years of monthly billing system reviews for a client “to determine the reasonableness and accuracy of reported time and expenses charged on invoices, as well as verify the accuracy of billed amounts on hosting service invoices” etc. Is this experience similar to the work that Liberty will be doing?
Fraud forensics experience – not really applicable to this scenario
“project health assessments” – “These projects required a strong understanding of project management, risk assessment, and development methodologies and best practices, more so than specific subject matter expertise of the systems being implemented” – does this mean they don’t have IT experience but believe they can still assess the implementation?
Project references
Maine PUC and Chuck Cohen listed as lead – assuming they did a good job, it would be nice for the Commission to have faith in their work
Work with NH Elec Coop including use of a sampling methodology on smart meter deployment – that seems on point
TMD has a current large contract with electric utility in Texas that involves testing on meters – on point

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201806133

RFP TITLE: Consulting Services – CMP Billing Case

BIDDER NAME: Berry Dunn McNeil & Parker, LLC

DATE: August 7, 2018

EVALUATOR NAME: Liz Wyman

EVALUATOR DEPARTMENT: Office of the Public Advocate

Information provided on TMD, its subcontractor – they have the specific meter experience “TMD has more than 50 years of experience performing complex meter testing for diverse utility providers across the country” – this experience seems like it would be very helpful
The resumes of the project team are impressive but not in the area of IT systems and metering; it would have been nice to see the resumes of the team members from TMD
Section II Proposed Services
Expect most meetings to be teleconferences with one in-person meeting; that’s fine but because they are in Portland, we would want them to commit to in-person meetings at the Commission if possible
They agreed to the work as laid out in Rider A of the Liberty contract; they specified the areas that TMD would be working, focused on the meter issues
Will ask about number of hours to spend reviewing data requests – this will be a big part of the job so we would expect them to make this a priority – why ask to negotiate on hours for this?
Will use a documented project management approach – good
Project timeline looks solid
Project assumptions – good idea to lay this out – it assumes there will be five Liberty reports – where did they get this?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case
BIDDER NAME: Vondle and Associates, Inc.
DATE: August 7, 2018
EVALUATOR NAME: Liz Wyman
EVALUATOR DEPARTMENT: Office of the Public Advocate

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

Individual Evaluator Comments:

Organization's qualifications and experience
Proposed team members Dave Vondle and Robert Rosenkoetter have experience with electric "customer service operations and customer information systems"
Robert worked with Oracle – this could be helpful
Has worked with OPA on CMP cases – helpful
Has not worked for utilities in Maine
Uses the consortium model to put together a team
Topics they have worked on "meter to cash customer billing systems" – doing what?
Project One is a MPUC cases they worked on with OPA for CMP and Emera involving a variety of topics; "the evaluation of a CMP credit and collections case" could be helpful
Project Two—working on behalf of a union in California on cost-of-service issues – doesn't seem on point
Project Three – for Connecticut PURA but the cases listed do not seem on point
They emphasize their experience working with OPA on CMP cases – good
For "Customer Service and Customer Information Systems" experience, he lists management audits for Pennsylvania and Connecticut regulators; but the cases are not described in sufficient fashion to determine if the experience is on point
"Conducted a meter to cash improvement program" for a utility – when was this and how helpful would this experience be – what do they know about smart meters? What do they know about cutover issues and assessment of what is going wrong with metering and billing?
Listed expert witness testimony but the RFP said no litigation at this time so not helpful
Senior Practice Director with Oracle "responsible for implementation of financial software information systems," including implementations at Bangor Hydro (so it was a while ago) and other utilities – would this experience be helpful? How would it compare to the CMP billing system?
Concerned that there is limited information on metering – would they be able to assess Liberty's approach and its conclusions?
Section II Proposed services
They accept the work as laid out in the RFP and Rider A of Liberty contract
Provides a very general but adequate work plan and timetable



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AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case

I, Eric Bryant accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Executive Department, Office of the Public Advocate. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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

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

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

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

Signature

A handwritten signature in black ink, appearing to be "Eric Bryant", written over a horizontal line.

Date

8/7/2018



STATE OF MAINE
EXECUTIVE DEPARTMENT
OFFICE OF THE PUBLIC ADVOCATE

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Governor

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Public Advocate

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 201806133
RFP TITLE: Consulting Services – CMP Billing Case

I, Liz Wyman accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Executive Department, Office of the Public Advocate. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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A handwritten signature in black ink, appearing to read "Liz Wyman", written over a horizontal line.

Signature

A handwritten date "8/7/18" in black ink, written over a horizontal line.

Date