

State of Maine
Master Score Sheet

| RFP# 202505078 | | | | | |
|--|-------------------|---------------------|---------------------|---------------------|--|
| Education Finance Compliance and Monitoring System | | | | | |
| Bidder Name: | | Concourse Tech Inc. | Ed Tech Soft, Inc. | Level Data, LLC | |
| Proposed Cost: | | <u>Disqualified</u> | \$1,405,000.00 | \$2,466,800.00 | |
| Scoring Sections | Points Available | | | | |
| Section I: Preliminary Information | Pass/Fail | Fail | Pass | Pass | |
| Section II: Organization Qualifications and Experience | 25 | N/A | 20.00 | 21.00 | |
| Section III: Proposed Services | 50 | N/A | 41.00 | 38.00 | |
| Section IV: Cost Proposal | 25 | N/A | 25.00 | 14.24 | |
| TOTAL | <u>100</u> | <u>N/A</u> | <u>86.00</u> | <u>73.24</u> | |



JANET T. MILLS
GOVERNOR

PENDER MAKIN
COMMISSIONER

DEPARTMENT OF
EDUCATION

RFP # 202505078

Education Finance Compliance and Monitoring System

1. Purpose

Through the subject RFP, the Department sought an integrated management and reporting system for school financial data. The system will be used for the purposes of collecting, managing, analyzing, and reporting for 266 school administrative units financial data per statute in [Title 20-A, Chapter 606-B](#).

2. Evaluation Process

An evaluation team was composed of six evaluators from the Maine Department of Education, Maine Office of Information Technology, and a school administrative unit. The evaluation team determined the eligibility of each Bidder, performed individual evaluations of each eligible proposal and recorded individual notes, then met as a team to apply the consensus method for recording the team notes and assigning scores to each proposal for Qualifications and Experience and the Proposed Services sections. Cost was scored using a mathematical formula.

All qualified Bidders and their teams attended a 90-minute virtual system demonstration meeting with the evaluation team, with a focus on the RFP's functional requirements, and included time for questions and answers.

3. Conditional Awards

As a result of the evaluation process, the evaluation team announced its conditional contract awards to the following vendor:

| Vendor Name |
|--------------------|
| Ed Tech Soft, Inc. |

Below are the key factors that resulted in the award selection made through this evaluation process:

4. Qualifications & Experience

- Thirty (30) years of experience in the field and a portfolio that demonstrates the ability to deliver the services required by the RFP and successfully perform under the prospective contract.
- Qualifications and skills noted throughout projects indicate the understanding of the requirements of the RFP and alignment with general state policy requirements.



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5. Proposed Services

- The technical assessment conducted by MaineIT was conditionally met.
- Thorough descriptions and documentation of processes and procedures that detailed a high level of technical compliance.
- A strong comprehensive visual system demonstration that highlighted automation and transparency.

6. Cost Proposal

Cost proposals were requested for the initial period of performance within the contract term. Bidders may include the cost for the renewal periods, but the renewal periods would not be factored into the scoring. Ed Tech Soft, Inc. submitted a cost of \$1,405,000.00 for the two-year initial contract term and was the lowest cost proposed.

7. Conclusion

Out of 100 possible points, the evaluation team awarded Ed Tech Soft, Inc. a total score of 86. The strength of awarded proposal outweighed the other proposals through a combination of its qualifications and experience, proposed services, and proposed cost. The evaluation team determined that the proposal submitted by Ed Tech Soft, Inc. represents the best value to the State of Maine.



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

January 15, 2026

Concourse Tech Inc.
Kelsey Shaner
169 Madison Ave STE 15520
New York, NY 10016

SUBJECT: Notice of Conditional Contract Award under RFP # 202505078,
Education Finance Compliance and Monitoring System

Dear Ms. Shaner:

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

- Ed Tech Soft, Inc.

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

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

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

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

Sincerely,

DocuSigned by:

Paula Gravelle

731F2C1A141648F

Paula Gravelle

Director of School Finance

Maine Department of Education

23 State House Station

Augusta, Maine 04333-0023

paula.b.gravelle@maine.gov

207-624-6792

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, Office of State Procurement Services [formerly the Division of Purchases], Chapter 120, § (2) (2).



**STATE OF MAINE
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January 15, 2026

Ed Tech Soft, Inc.
Vinita Bakhshi
3296 Summit Ridge Parkway Suite 230
Duluth, GA 30096

**SUBJECT: Notice of Conditional Contract Award under RFP # 202505078,
Education Finance Compliance and Monitoring System**

Dear Ms. Bakhshi:

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

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Paula Gravelle
Director of School Finance
Maine Department of Education
23 State House Station
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January 15, 2026

Level Data, LLC
Kimberly Wilson Linson
56 Broad St. STE 14018
Boston, MA 02109

**SUBJECT: Notice of Conditional Contract Award under RFP # 202505078,
Education Finance Compliance and Monitoring System**

Dear Ms. Linson:

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

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

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Paula Gravelle
Director of School Finance
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STATEMENT OF APPEAL RIGHTS

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Concourse Tech Inc.

DATE: 11/14/2025

SUMMARY PAGE

Department Name: Education

Name of RFP Coordinator: Paula Gravelle

Names of Evaluators: Ida Batista, Paula Gravelle, Denise Towers, Jeff Verrill, Colin Walsh, Kathy Warren

| <u>Pass/Fail Criteria</u> | <u>Pass</u> | <u>Fail</u> |
|--|-------------------------|-----------------------|
| Section I. Preliminary Information (Eligibility) | | X |
| <u>Scoring Sections</u> | <u>Points Available</u> | <u>Points Awarded</u> |
| Section II. Organization Qualifications and Experience | 25 | N/A |
| Section III. Proposed Services | 50 | N/A |
| Section IV. Cost Proposal | 25 | N/A |
| <u>Total Points</u> | <u>100</u> | <u>N/A</u> |

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Concourse Tech Inc.

DATE: 11/14/2025

**OVERVIEW OF SECTION I
Preliminary Information**

| |
|------------------------------------|
| |
| Section I. Preliminary Information |

Evaluation Team Comments:

The proposal was missing elements and did not demonstrate an understanding of the services being requested in the RFP. It has, therefore, been disqualified from award consideration. Organizational Chart not included. Appendix H. Service Level Agreement (SLA) was not provided. Missing sections of Appendix D. Technical Assessment Form.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Ed Tech Soft, Inc.

DATE: 11/14/2025

SUMMARY PAGE

Department Name: Education

Name of RFP Coordinator: Paula Gravelle

Names of Evaluators: Ida Batista, Paula Gravelle, Denise Towers, Jeff Verrill, Colin Walsh, Kathy Warren

| <u>Pass/Fail Criteria</u> | <u>Pass</u> | <u>Fail</u> |
|--|--------------------------------|------------------------------|
| Section I. Preliminary Information (Eligibility) | X | |
| <u>Scoring Sections</u> | <u>Points Available</u> | <u>Points Awarded</u> |
| Section II. Organization Qualifications and Experience | 25 | 20 |
| Section III. Proposed Services | 50 | 41 |
| Section IV. Cost Proposal | 25 | 25 |
| <u>Total Points</u> | <u>100</u> | <u>86</u> |

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Ed Tech Soft, Inc.

DATE: 11/14/2025

**OVERVIEW OF SECTION I
Preliminary Information**

| |
|------------------------------------|
| |
| Section I. Preliminary Information |

Evaluation Team Comments:

Pass

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078
RFP TITLE: Education Finance Compliance and Monitoring System
BIDDER: Ed Tech Soft, Inc.
DATE: 11/14/2025

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

| | <u>Points Available</u> | <u>Points Awarded</u> |
|--|-------------------------|-----------------------|
| Section II. Organization Qualifications and Experience | 25 | 20 |

Evaluation Team Comments:

- I. Overview of the Organization
 - Tenure – 30 years of experience in the field, showed in their response
 - Proposal well put together, made sense with the RFP structure
 - Strong project examples and reference that aligned with what the department is looking for
 - Two projects referenced were DOE
 - Only current project listed is MEFS, a mild concern that it is the only current, other major projects ended 2022 2025
- II. Subcontractors
 - Going to add subcontractors to support the work
 - Acknowledging that they need to increase the team size
 - ITECS – are there other subcontractors?
 - 15 years of experience in custom software solutions
- III. Organizational Chart
 - Large org chart submitted, but current experience working with them is a smaller team
 - Have not had employed development staff, subcontracted out development staff. Stable model that works for the Department
 - Could be a concern about consistency
 - Positive that the project manager has worked with the Department before, okay with the staffing levels. Established relationship with the team.
 - Generic
 - Should be able to see the customer client touch points
 - Is the size appropriate for the work needed? What is the risk?
- IV. Litigation
 - No litigation mentioned
- V. Financial Viability
 - D&B included, low risk, financial statement not included, but not unusual for a private company

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

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VI. Certificate of Insurances

- Hartford coverage seems appropriate
- Valid

VII. Licensure/Certification

- Provided and detailed

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

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BIDDER: Ed Tech Soft, Inc.

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**EVALUATION OF SECTION III
Proposed Services**

| | <u>Points Available</u> | <u>Points Awarded</u> |
|--------------------------------|-------------------------|-----------------------|
| Section III. Proposed Services | 50 | 41 |

Evaluation Team Comments:

I. Technical Assessment

- Conditionally met. If selected, the bidder would need to provide plans, policies, and certifications where cited, artifacts should be provided to MainEIT for review.
- Responses good for the most part
- Cited and referenced policies, could have provided more evidence
- Granular responses on the things they do have

II. Services to be Provided

- Covered all capabilities and new audit review solution presented
- Seemed like a new solution rather than modifying the current MEFS system. Renaming and adding functionality
- How much of this is the old system with new functions?
- Able to integrate MEFS into DOE data system
- Concern regarding audit workflow process being modern and flexible
- Flow chart for audit attempts to understand the workflow
- Could have been misunderstanding in the audit workflow process
- Did not see experience with building user dashboards and the workflow process
- Need more information on real time modification of rules engine
- The ability for the Department to modify the solution is not currently included, changes would need to be made by the developers – proved to be not true from the demo
- There has been satisfaction with the vendor’s current product for the state, and we feel that we can work with the vendor to implement the additional components needed
- Report building is done in SSRS, not able to be done by the Department unless trained in SSRS or SQL. – moving from SSRS to PowerBI
- Code combinations violations from an LEA perspective, much more integrated for the LEAs to see the code violations. Assists at both LEA and State level, will reduce back and forth from LEAs and the SEA
- Mentioned train the trainer model

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

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BIDDER: Ed Tech Soft, Inc.

DATE: 11/14/2025

- Integration with AdvantageME for payments
 - Would be interested to see how the audit workflow functions in the demo
- III. General/Technical Requirements
- Integrations with DOE systems incomplete. Inaccurately represented what is currently present for system integrations
 - Stated full compliance with NIST but would require updates to meet NIST. Inconsistent
 - SLA statements response was strong and provided actual results
 - Change management process is mature but will need to be brought up to speed with State standards
 - Willing and working with OIT – very responsive
- IV. Implementation – Work Plan
- Complete and standardized
 - Automated project management tool
 - Team approach
 - Thorough and optimistic timeline
 - Optimistic but able to maintain current system while adding new functionality with timeline
 - Working with the Dept to simplify current processes, and eliminating pain points of end users
 - Blend of agile and waterfall, iterations within major phases. Solid understanding

DEMONSTRATION 11/25/2025

- Modernization of current platform with additions
- Expecting to see a demo of what the state would be getting. Felt like different modules across different packages
- Did their research
- Templates were interesting
- More automation and transparency from the State and SAU side
- Showed the ability to have customization
- User friendly ad hoc reporting features – additional functionality
- Modernizing, working with the Dept to upgrade
- Promising features - calendar
- Smaller shop – has pros and cons
- Existing relationship is a pro, easier transition period, personalized service, work history
- Concerns about resources/graphics for SAU needs
- Ability to track communications

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Ed Tech Soft, Inc.

DATE: 11/14/2025

**EVALUATION OF SECTION IV
Cost Proposal**

| Lowest Submitted Cost Proposal | , | Cost Proposal Being Scored | x | Score Weight | = | Score |
|-----------------------------------|---|-------------------------------|----------|------------------|----------|-----------|
| \$1,405,000.00 | , | \$1,405,000.00 | x | 25 points | = | 25 |

Evaluation Team Comments:

Formula cost.

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed TECH SOFT, INC.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

Consensus Comments - Technical Assessment Team:

| Consensus Decision: <i>Conditionally Met</i> | | |
|---|---|---|
| <p>Overall quality of response and evidence: If selected, the bidder would need to provide plans, policies, and certifications where cited, artifacts should be provided to Maine IT for review.</p> | | |
| Data Compliance | | |
| Publicly available information | NIST 800-171 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> Certification cited, evidence not provided | |
| | Maine FOAA | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> | | |
| <i>Explanation:</i> <i>Evidence not provided</i> | | |
| Confidential Personally Identifiable Information (PII) | Maine Breach Notification Law | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> <i>Evidence not provided</i> | |
| | NIST 800-53: Rev5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> <i>Evidence not provided</i> | |
| | Privacy Act of 1974 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> <i>Evidence not provided</i> | |

STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed TECH SOFT, INC.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | | |
|---------------------------|--|--|
| | U.S. DHHS-OCSE | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | Explanation: <i>Evidence not provided</i> |
| Student Education Data | § Family Educational Rights and Privacy Act: FERPA | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: <i>Not applicable response</i> |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | | Explanation: |
| Personal Information from | § Driver's Privacy Protection Act (Title XXX) ("DPPA") 18 U.S.C. Chapter 123, §§ 2721 – 2725 | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: <i>Not applicable response</i> |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | | Explanation: |
| MaineIT | | |
| H1 | | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | Explanation: <i>Lack of detail</i> |
| H2 | | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | Explanation: <i>Lack of detail</i> |
| H3 | | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |

STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed TECH SOFT, INC.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|---------------------------------------|--|
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Policy cited but not provided |
| A1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Policy cited but not provided |
| A2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| A3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| A4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| Information Security Standards | |
| S1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Information Security Management System cited but not provided |
| S2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| S3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| S4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed TECH SOFT, INC.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|------------------------------------|--|
| S5 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| Cloud Service Provider Reqs | |
| CSP1 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| CSP2 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| CSP3 | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input checked="" type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: <i>No response</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| CSP4 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| CSP5 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| CSP6 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Explanation: <i>Lack of evidence</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed TECH SOFT, INC.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-------|--|
| CSP7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Policy cited, but not provided |
| CSP8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Plan and tool cited, but not information provided |
| CSP11 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Tool cited, but no information provided |
| CSP12 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP13 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed TECH SOFT, INC.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|--------------------------|--|
| CSP14 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Plan cited, but not provided |
| NIST Requirements | |
| N1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: No mention of physical access controls |
| N2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: SSP cited, but not provided |
| N4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: BCDR plan cited, but not provided |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed TECH SOFT, INC.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|--|
| N7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Policy cited, but not provided |
| N10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N11 | Quality of Response: <input type="checkbox"/> Provided a Response <input checked="" type="checkbox"/> Did not provide a response |
| | Explanation: No response provided |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N12 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N13 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |

STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|---|
| N14 | <i>Quality of Response:</i> <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation: Not applicable</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Level Data, LLC

DATE: 11/14/2025

SUMMARY PAGE

Department Name: Education

Name of RFP Coordinator: Paula Gravelle

Names of Evaluators: Ida Batista, Paula Gravelle, Denise Towers, Jeff Verrill, Colin Walsh, Kathy Warren

| <u>Pass/Fail Criteria</u> | <u>Pass</u> | <u>Fail</u> |
|--|-------------------------|-----------------------|
| Section I. Preliminary Information (Eligibility) | X | |
| <u>Scoring Sections</u> | <u>Points Available</u> | <u>Points Awarded</u> |
| Section II. Organization Qualifications and Experience | 25 | 21 |
| Section III. Proposed Services | 50 | 38 |
| Section IV. Cost Proposal | 25 | 14.24 |
| <u>Total Points</u> | <u>100</u> | <u>73.24</u> |

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Level Data, LLC

DATE: 11/14/2025

**OVERVIEW OF SECTION I
Preliminary Information**

| |
|------------------------------------|
| |
| Section I. Preliminary Information |

Evaluation Team Comments:

Pass

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078
RFP TITLE: Education Finance Compliance and Monitoring System
BIDDER: Level Data, LLC
DATE: 11/14/2025

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

| | <u>Points Available</u> | <u>Points Awarded</u> |
|--|-------------------------|-----------------------|
| Section II. Organization Qualifications and Experience | 25 | 21 |

Evaluation Team Comments:

- I. Overview of the Organization
 - Currently SLDS vendor
 - Acquired Cedar Labs
 - Would have like clarity on which projects were Level Data and which were Cedar Labs.
 - Full ownership of functionality and staff
 - Restaffing as LD has acquired other companies
 - Are there proven results since LD acquired other companies?
 - Successful implementations in other states
 - Responsive, willing to work collaboratively with the Department
 - Potential for risk with staffing turnovers and acquisitions
 - Familiar with DOE and technologies being used, secure, modern, stable, educational standards
- II. Subcontractors
 - No subcontractors
- III. Organizational Chart
 - Provided
 - Generic
 - Pretty stable, turnover in the roles
 - Not as tight of access to the engineering staff
 - Org chart has four separate teams that are not linked together
 - Defined the positions
- IV. Litigation
 - None
- V. Financial Viability
 - Lein is noted, could be concerning. Multiple would be more concerning.
 - History of paying late
 - low to moderate risk
 - some of the information within the report is 2024, D&B, not LD controlled.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

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BIDDER: Level Data, LLC

DATE: 11/14/2025

VI. Certificate of Insurances

- COI is out of date, printed 9/15, expired 9/24
- State listed as additional insured
- No cyber insurance listed

VII. Licenses/Certification

- No notes

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078
RFP TITLE: Education Finance Compliance and Monitoring System
BIDDER: Level Data, LLC
DATE: 11/14/2025

**EVALUATION OF SECTION III
Proposed Services**

| | <u>Points Available</u> | <u>Points Awarded</u> |
|--------------------------------|-------------------------|-----------------------|
| Section III. Proposed Services | 50 | 38 |

Evaluation Team Comments:

I. Technical Assessment

- Lot of lacking information, got responses for most everything, but lacking detail and how they're meeting requirements
- Not met. If selected, bidder would need to provide additional evidence to support information security policies, SBOM, security plan, and SOC2 type 2 report.

II. Services to be Provided

- DOE ownership and management of rules without technical implementation
- Standalone or a part of Connect? Demo to clarify
- Potential of increased risk with having all eggs in one basket
- Recipe based rules creation
- Real time account verification valuable to reduce time on LEAs and SEA
- Don't necessarily want everything automated
- Emphasis on flexibility
- Mentioned natural language query – AI that we may not want
- What happens with multiple certified files within the same quarter? Clarification needed on workflow process
- Will architectural infrastructure for finance mirror other collections? How?
- Duplicate detection of records could be problematic for the needs of the Dept
- Lack of finance domain experience

III. General/Technical Requirements

- Represented technical solutions as in play when not
- Do not have automated integration yet, goal
- Complying with Deployment Certification, but process has not been smooth
- Willingness to work with the Dept
- Future focused, legacy functions may need configuring
- Concern with usability and meeting functional needs of the UI and external interfaces with the LEAs and DOE internal
- Mention of users ability to create reporting

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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- Consistency of end user experiences across multiple systems in the field, decreased human error, consistency of data
- Connect does not currently ingest PDFs, could be possible with new development

IV. Implementation – Work Plan

- Go live of Jan 2028, would need to keep current system until that go live date
- Incremental approach to workplan, phased, more information needed
- Referenced Agile, but draft is waterfall, how would incremental work within this?
- Reasonable timeline
- Well defined project management process
- Reference to a Dept project manager
- Limited examples of testing – only functional referenced
- Strong IT security architecture

DEMONSTRATION 12/4/2025

- Did not show finance system as much as would have liked
- Proposal stronger than presentation
- Interoperability focused
- Struggled to envision the Dept's needs in the systems presented
- Did not show the business rule configuration
- Flexibility, real time reporting, validations, and communications processes could see how it would apply to the needs of the Dept
- Showed functionality across different apps
- Messaging, timeline, training all left out
- Hands on demonstration
- Looked like it would be a part of the existing Connect platform

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER: Level Data, LLC

DATE: 11/14/2025

**EVALUATION OF SECTION IV
Cost Proposal**

| Lowest Submitted Cost Proposal | , | Cost Proposal Being Scored | x | Score Weight | = | Score |
|-----------------------------------|---|-------------------------------|----------|------------------|----------|--------------|
| \$1,405,000.00 | , | \$2,466,800.00 | x | 25 points | = | 14.24 |

Evaluation Team Comments:

Formula

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

Consensus Comments - Technical Assessment Team:

| | | | |
|---|-------------------------------|---|--|
| Consensus Decision: <i>Not Met</i> | | | |
| Overall quality of response and evidence: <i>If selected, bidder would need to provide additional evidence to support information security policies, SBOM, security plan, and SOC2 type 2 report.</i> | | | |
| Data Compliance | | | |
| Publicly available information | NIST 800-171 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> | |
| | | Explanation: | |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> | |
| | Maine FOAA | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> | |
| | | Explanation: | |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> | |
| Confidential Personally Identifiable Information (PII) | Maine Breach Notification Law | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> | |
| | | Explanation: | |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> | |
| | NIST 800-53: Rev5 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> | |
| | | Explanation: | |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> | |
| | Privacy Act of 1974 | Explanation: <i>Weak evidence; bidder cites many control families and domains but no evidence of how these are implemented in policy or practice</i> | |
| | | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> | |
| | | Explanation: | |
| | | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |

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TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | | |
|---------------------------|--|--|
| | | <i>Explanation: No evidence provided</i> |
| | U.S. DHHS-OCSE | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: No evidence provided</i> |
| Student Education Data | § Family Educational Rights and Privacy Act: FERPA | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation: Not applicable</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation:</i> |
| Personal Information from | § Driver's Privacy Protection Act (Title XXX) ("DPPA") 18 U.S.C. Chapter 123, §§ 2721 – 2725 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation: Not applicable</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | | <i>Explanation:</i> |
| MaineIT | | |
| H1 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Lack of detail</i> |
| H2 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Lack of detail</i> |
| H3 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |

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TA REVIEWER DEPARTMENT: MaineIT

| | |
|---------------------------------------|---|
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| A1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| A2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| A3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| A4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| Information Security Standards | |
| S1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of evidence. Security protocol cited, but no information provided.</i> |
| S2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of evidence</i> |
| S3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation:</i> |
| S4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|------------------------------------|--|
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| S5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: SBOM cited, but not provided |
| Cloud Service Provider Reqs | |
| CSP1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: SOC2 cited, but not provided |
| CSP2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Not addressed |
| CSP3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| CSP4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| CSP5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| CSP6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-------|--|
| | <i>Explanation: Lack of detail</i> |
| CSP7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| CSP8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| CSP9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| CSP10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| CSP11 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| CSP12 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |
| CSP13 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Lack of detail</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|--------------------------|--|
| CSP14 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| NIST Requirements | |
| N1 | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: <i>Not applicable</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| N2 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| N3 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: Security plan cited, but not provided |
| N4 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| N5 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |
| N6 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Explanation: |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|--|
| N7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Plans cited, but not provided |
| N8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| N9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N11 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N12 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Plans cited, but not provided. Lack of detail. |
| N13 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |

STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JEFF VERRILL, BEN HASCHALK, JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|---|
| N14 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 10/6/2025

EVALUATOR NAME: Ida Batista

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Experience with Ed finance data collection
- Current state vendor 17 years with ME DOE
- Experience creating other state DOE data tools
- 2 projects Maine specific – finance and transportation; others for Georgia Dpt of early Care & learning Provider management and NC dept of Public Instruction Early intervention and special ed data collection
- Only 1 project still active

2. Subcontractors

- EBusiness consulting services –implementation and initial phase;
- Development; quality testing, training and managed services
- 15 years exp with customization development
- staff

3. Organizational Chart

- Provided
- Generic
- 18 members
- Project manager identified, known person to MeDOE

4. Litigation

- None

5. Financial Viability

- Dun & Bradstreet provided - risk low

6. Licensure/Certification

- Provided - several

7. Certificate of Insurance

- Good from 6/20/2025 - 6/20/2026

II. Proposed Services

1. Technical Assessment

- Thoughtful to what is off shelf and what needs to be customized
- Seems able to meet the technical standards of the state.

2. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 10/6/2025

EVALUATOR NAME: Ida Batista

EVALUATOR DEPARTMENT: Education

- BrightFams –financial data management system
 - Project management
 - Hosting & training
 - Support
 - Adm module - Dashboard
 - SLA
 - User interfaces internal and external
 - Reporting & analytics
 - Audit management
 - Integration with other systems
 - Understands the financial system
 - Needs more understanding of audit system & function with auditors
 - Good flow charts of financial system
 - Flow chart for audit attempts to understand the workflow
 - Appreciated Handbook and code maintenance and validation
 - Need more information on Real-time modification of rules engine p.19
 - What about user defined codes?
 - Admin dashboard needs the visualization suggested
 - Creation of dashboard widget for UX interface
 - Prevent duplicate submissions p23 needs more information for me to understand.
 - Training: train the trainer model which I think is positive
 - Positive Project management
 - Change management plan
3. General/Technical Requirements
- AWS GovCloud
 - ISO27001:2022 certified
 - Strategy for risks and mitigation
 - Quality Assurance positive
 - Willing and working with Me OIT
 - Documentation and ongoing support
4. Implementation – Work Plan
- Thorough and optimistic
 - Team approach
 - Gap analysis
 - Appreciate the charts

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 11/5/2025

EVALUATOR NAME: Paula Gravelle

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - P
 - The only current project listed is MEFS
 -
 - 2. Subcontractors
 - P
 - 3. Organizational Chart
 - P
 - 4. Litigation
 - P
 - 5. Financial Viability
 - Q – Dun & Bradstreet report indicates no financial data available
 - 6. Licensure/Certification
 - P
 - 7. Certificate of Insurance
 - P
- II. Proposed Services
 - 1. Technical Assessment
 -
 - 2. Services to be Provided
 - P
 -
 -
 - 3. General/Technical Requirements
 - P
 -
 -
 - 4. Implementation – Work Plan
 - P
 -
 -
- III. Demonstrations
 -

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: September 25, 2025

EVALUATOR NAME: Denise Towers

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - This entity acquired the business that built the current system we use for the purpose. They understand our needs and requirements.
 - Provider of easy to use and customized education solutions
 - 2. Subcontractors
 - IT & EBusiness Consulting Services, Inc. - 15+ experience
 - 3. Organizational Chart
 - Provided Org. Chart but no position responsibility description
 - 4. Litigation
 - No Litigation
 - 5. Financial Viability
 - Received documents but no D&B Rating
 - 6. Licensure/Certification
 - Industry recognized certifications and credentials
 - 7. Certificate of Insurance
 - Received 5/22/25

- II. Proposed Services
 - 1. Technical Assessment
 - Appears prepared
 - Knowledge of our needs
 - 2. Services to be Provided
 - Covered all current capabilities of our current system
 - New audit review solution presented
 - 3. General/Technical Requirements
 - Can meet all requirements with some customizing
 - 4. Implementation – Work Plan
 - Workplan to be created with automated project management tool

- III. Demonstrations
 - No demo but did provide 1st attempt at workflows

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 11/10/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Positive: Over 30 years of experience (1992) working with state agencies for education data management, Financial Data Management being a core tenet of this. Longevity is shared as a key decision point – average contract term is 17+ years.
- Positive: Experience working with multiple State Departments of Education.
- Interesting: Direct involvement of C-suite leadership in Project Engagements, sighting background experience and qualification as the rationale, in addition to lean management structures.
- Interesting: Has held the Maine MEFS contract for 19 years. Agree with response this provides great insight and institutional knowledge. Interested to hear perspective on how the vendor reflects this as a positive, does DOE agree? Can see this also being a detractor to moving past any current issues.
- Interesting: One of the cited Projects, Student Transportation and Routing System isn't one we've actively managed Deployment Certification for – this is the first time seeing/hearing about the application that appears to have been in place since 2008. Speaks to adherence to MainIT policies.

2. Subcontractors

- IT & EBusiness Consulting Services, Inc (ITECS): Staff Augmentation for AppDev

3. Organizational Chart

- Interesting: Appears sub-contractor will be used as Staff Augmentation in existing organization. Do we consider/discuss the complexities this can layer on a working agreement, ensuring clarity in management accountabilities (e.g. who do we report any issues/challenges with)?

4. Litigation

- No current or past litigation in the prior 5-years.

5. Financial Viability

- Lack of financial information preventing full analysis – risk seems low.

6. Licensure/Certification

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 11/10/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

- Positive: Provided several exiting certifications and licensing of staff:
 1. ISO (suitable contingency for SOC2) certified – verified as recently as 10/27/2025 with most recent MaineIT review.
 2. AWS Fedramp installation (GovCloud)
 3. Mix of PMP and Product Management certifications on staff
- 7. Certificate of Insurance
 - Liability policy rider provided, no additional details or comments.

II. Proposed Services

1. Technical Assessment
 - Conditionally Met: If selected, the bidder would need to provide plans, policies, and certifications where cited, artifacts should be provided to Maine IT for review.
2. Services to be Provided
 - Question: Is BrightFAMS what we have implemented today for MEFS, or is this a new solution being proposed specific to the requirements of this RFP?
 - Positive: Aware of the existing payment service (AdvantageME) and committing to integrating with this solution.
 - Key Features:
 1. Administration (workflow and approvals, security, finance codes)
 2. Integration capable
 3. Data input functionality (validation and migration); file upload and manual entry (no mention of integration with school/district applications).
 4. Audit Workflow Management including file uploads
 5. Reporting/Analytics
 - Positive: Seems to have a grasp on the financial collection and reporting high-level requirements already. See Scope of Services starting in Section “A”.
 - Positive: Defined workflow documents exist and can be used as a starting point for configuration/changes – a lot of information provided on the current capabilities and would only be curious about the levels of customization available to what is presented. How much of this can be customized and what is “baked into” the solution.
3. General/Technical Requirements (C)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 11/10/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

- Positive: Existing MEFS solution already integrated with NEO for security access and administration. (Edit: Confirmed in consensus scoring session this is not accurate)
- Interesting: Stated full compliance with NIST standards but then cited upgrades/configuration required to extend logging of login attempts to include other key NIST required fields.
- Positive: Ten-year experience with SIF integrations in the State of North Carolina.
- Interesting: Would like to understand more the current “integration” of MEFS with the SLDS.
- Interesting: Many responses indicate the capability referenced in the technical requirements already exist in the application. Was this evident and a choice was made not to use this vendor, or maybe these are features/capabilities we weren’t aware existed in the solution?
- Positive/Negative: IS027001 compliant, willing to obtain SOC2 compliance within 1-year of contract award if required by State of Maine.
- Positive: Very strong response to SLA statements, provided current test results based on concurrent usage. Great answer!

4. Implementation – Work Plan (4)

- Interesting: Iterations within phase gates approach. Cycles until consensus and then move on to the next project phase (Requirements, Design, Build... etc.). Cycles seem most defined in Development and Testing.
- Interesting: Waterfall, manufacturing style approach to Project Management (Not Product Management). Not a concern per se, but something to note of less modern approaches to software development. Timelines in draft milestones are also very aggressive, and occur during finance busy season (interesting insight into understanding of existing agency/business cycles).

•

III. Demonstrations

•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 11/5/2025

EVALUATOR NAME: Colin Walsh

EVALUATOR DEPARTMENT: RSU 57

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Their Section II is very well put together, thorough and detailed
 - References in Section II/Schedule C appeared strong and the descriptions were detailed.
 -
 - 2. Subcontractors
 - Only use ITECS as a subcontractor during implementation and initial phases
 - Help with quality, testing, training
 -
 - 3. Organizational Chart
 - Not excessively detailed but does provide an overview of responsibilities and structure but no narrative job descriptions.
 - 4. Litigation
 - No litigation in past 5 years
 -
 - 5. Financial Viability
 - D&B information for what was applicable was strong with low risk
 - Paydex – 80: Viability –2: Portfolio- 1: Data Depth – C: No FS provided
 - 6. Licensure/Certification
 - Solid licensure standards
 -
 - 7. Certificate of Insurance
 - This was present – use Hartford - \$2M general aggregate - \$5M umbrella
- II. Proposed Services
 - 1. Technical Assessment
 -
 - 2. Services to be Provided
 - Very thorough & detailed
 -

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: 11/5/2025

EVALUATOR NAME: Colin Walsh

EVALUATOR DEPARTMENT: RSU 57

•

3. General/Technical Requirements

- The reporting they describe appears solid with flexibility as well.
- I like the sole source entry data description – question whether this is throughout ALL applications?
- I like the state audit process that is described and it appears to be quite thorough – I am interested in the demo to see how this meets the Maine DOE's needs?
- Does the integrated data described include ALL data ??? ex. Staff
- Code combination violations for the LEA perspective appears to be well thought out and would be helpful.

•

4. Implementation – Work Plan

- Timeline for implementation seems tight and aggressive

-
-

III. Demonstrations

-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: November 7th, 2025

EVALUATOR NAME: Katherine Warren

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- P

2. Subcontractors

- Yes

3. Organizational Chart

- Present – only senior execs named

4. Litigation

- None

5. Financial Viability

- present

6. Licensure/Certification

- present

7. Certificate of Insurance

- Present – no cyber

II. Proposed Services

1. Technical Assessment

- Conditionally Met – responses were complete, lots of citations of the things that exist. Examples not provided, no links to plans.
- Comprehensive, showed their experience with SOM processes

2. Services to be Provided

- N – Conflation of SSO functionality with interoperability with NEO and Advantage (current?)
- I – no mention of modernization of existing process
- Q – there seems to be a conflation of audit tracking and the reportable data from the financial uploads. Multiple references to “audit tracking” that are associated with the “audit” ie internal controls, of the financial data.
- N – No SEA business rules configuration management
- I – report creation in SSRS, no SEA access except through vendor or staff trained in SSRS or SQL

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Ed Tech Soft, Inc.

DATE: November 7th, 2025

EVALUATOR NAME: Katherine Warren

EVALUATOR DEPARTMENT: Education

3. General/Technical Requirements
 - Comments included above in Services.
 - I – Change Management process needs to be modernized
 - I – Data Migration might be a zero or lesser lift.
 -
 4. Implementation – Work Plan
 - Complete - standardized
 - Schedule – optimistic but also a benefit given vendor history & experience in Maine
 -
- III. Demonstrations
-

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| Consensus Technical Assessment Decision: | |
|---|--|
| Data Compliance | |
| NIST 800-171 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Listed as ISO270001 compliant, not SOC2 |
| Maine FOAA | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Lack of evidence |
| Maine Breach Notification Law | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Lack of evidence |
| NIST 800-53: Rev5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Lack of evidence |
| Privacy Act of 1974 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Lack of evidence |
| U.S. DHHS-OCSE | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Lack of evidence |
| FERPA | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | N/A |
| DPPA | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | N/A |
| MaineIT | |
| H1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Adequate Response |
| H2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| | |
|---------------------------------------|---|
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Lack of evidence |
| H3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Lack of evidence |
| A1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Lack of evidence – will share policy if awarded contract |
| A2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| A3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| A4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| Information Security Standards | |
| S1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Lack of evidence, plan not provided |
| S2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Lack of evidence on how technical and organizational safeguards are implemented. |
| S3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| S4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| S5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response – SBOM Provided |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| Cloud Service Provider Reqs | |
|------------------------------------|--|
| CSP1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Adequate Response |
| CSP2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Adequate Response |
| CSP3 | <i>Quality of Response:</i> <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP6 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP7 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP8 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP9 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP10 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |
| CSP11 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Adequate Response of understanding, no evidence provided |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| | |
|------------------|---|
| CSP12 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| CSP13 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| CSP14 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| NIST Reqs | |
| N1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No mention of physical access controls, only technical/digital |
| N2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| N3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| N4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Not SOC2 compliant, but ISO27001. No evidence provided |
| N5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| N6 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| N7 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| N8 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| | |
|-----|---|
| N9 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| N10 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Adequate Response of understanding, no evidence provided |
| N11 | <i>Quality of Response:</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| N12 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response |
| N13 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| N14 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Not Applicable, nothing added |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: Ed Tech
DATE: 09/30/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

Individual Reviewer Comments:

| Data Compliance | | |
|--|-------------------------------|--|
| Publicly available information | NIST 800-171 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Maine FOAA | Explanation: Weak evidence; lacking in detail in how requirement is met. *ISO27001:2022 certification cited. |
| | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| Confidential Personally Identifiable Information (PII) | Maine Breach Notification Law | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | Explanation: No evidence; requirement not addressed. |
| | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | NIST 800-53: Rev5 | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | | Explanation: |
| | Privacy Act of 1974 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | U.S. DHHS-OCSE | Explanation: No evidence; requirement not addressed. |
| | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | Family Educational | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | Explanation: No evidence; requirement not addressed. |
| | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: Ed Tech
DATE: 09/30/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | | |
|---------------------------|--|--|
| Student Education Data | Rights and Privacy Act: FERPA | <i>Explanation: "Not Applicable" response.</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | | <i>Explanation:</i> |
| Personal Information from | § Driver's Privacy Protection Act (Title XXX) ("DPPA") 18 U.S.C. Chapter 123, §§ 2721 – 2725 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation: "Not Applicable" response.</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | | <i>Explanation:</i> |
| MaineIT | | |
| H1 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Weak evidence; lacking in detail in how requirement is met.</i> |
| H2 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Weak evidence; lacking in detail in how requirement is met.</i> |
| H3 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Weak evidence; lacking in detail in how requirement is met. *Policy cited but not provided.</i> |
| A1 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Weak evidence; lacking in detail in how requirement is met. *Policy cited but not provided.</i> |
| A2 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: Ed Tech
DATE: 09/30/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|---------------------------------------|--|
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| A3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| A4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| Information Security Standards | |
| S1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: *ISMS cited but not provided. |
| S2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| S3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| S4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| S5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input checked="" type="checkbox"/> Strong <input type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Robust SBOM provided. |
| Cloud Service Provider Reqs | |
| CSP1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: Ed Tech
DATE: 09/30/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|------|--|
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Weak evidence; lacking in detail in how requirement is met. |
| CSP7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| CSP8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: Ed Tech
DATE: 09/30/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|--------------------------|--|
| | <i>Explanation:</i> |
| CSP9 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| CSP10 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Weak evidence; lacking in detail in how requirement is met. *Plan (& tool) cited but not provided.</i> |
| CSP11 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Weak evidence; lacking in detail in how requirement is met.</i> |
| CSP12 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| CSP13 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| CSP14 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| NIST Requirements | |
| N1 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

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RFP TITLE: DOE FINANCIAL SYSTEM
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TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|----|---|
| | <p>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</p> <p>Explanation: Weak evidence; evidence provided focuses on non-physical controls only.</p> |
| N2 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation:</p> |
| N3 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation: *SSP cited but not provided.</p> |
| N4 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation:</p> |
| N5 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation:</p> |
| N6 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation:</p> |
| N7 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</p> <p>Explanation: Bidder excludes themselves from the requirement. This should be verified with the RFP committed. *Policy cited but not provided.</p> |
| N8 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> |

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TA REVIEWER DEPARTMENT: MaineIT

| | |
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| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| N9 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> *Policy cited but not provided. |
| N10 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| N11 | <i>Quality of Response:</i> <input type="checkbox"/> <i>Provided a Response</i> <input checked="" type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| N12 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| N13 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| N14 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> "Not Applicable" response. |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

Consensus Comments - Technical Assessment Team:

| Consensus Decision: <i>Conditionally Met</i> | | |
|---|-------------------------------|---|
| <p>Overall quality of response and evidence: If selected, the bidder would need to provide plans, policies, and certifications where cited, artifacts should be provided to Maine IT for review.</p> | | |
| Data Compliance | | |
| Publicly available information | NIST 800-171 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | <i>Explanation:</i> Certification cited, evidence not provided |
| | Maine FOAA | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> | | |
| <i>Explanation:</i> <i>Evidence not provided</i> | | |
| Confidential Personally Identifiable Information (PII) | Maine Breach Notification Law | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | <i>Explanation:</i> <i>Evidence not provided</i> |
| | NIST 800-53: Rev5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | <i>Explanation:</i> <i>Evidence not provided</i> |
| | Privacy Act of 1974 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | <i>Explanation:</i> <i>Evidence not provided</i> |

STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT

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BIDDER NAME: Ed TECH SOFT

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | | |
|---------------------------|--|--|
| | U.S. DHHS-OCSE | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | Explanation: <i>Evidence not provided</i> |
| Student Education Data | § Family Educational Rights and Privacy Act: FERPA | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: <i>Not applicable response</i> |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | | Explanation: |
| Personal Information from | § Driver's Privacy Protection Act (Title XXX) ("DPPA") 18 U.S.C. Chapter 123, §§ 2721 – 2725 | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: <i>Not applicable response</i> |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | | Explanation: |
| MaineIT | | |
| H1 | | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | Explanation: <i>Lack of detail</i> |
| H2 | | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | | Explanation: <i>Lack of detail</i> |
| H3 | | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | | Explanation: |

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TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

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|---------------------------------------|--|
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Policy cited but not provided |
| A1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lacking details how |
| A2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| A3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| A4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| Information Security Standards | |
| S1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Information Security Management System cited but not provided |
| S2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| S3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| S4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Provided sufficient detail on how the requirement is met |

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TA REVIEWER DEPARTMENT: MaineIT

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| S5 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Provided sufficient detail on how the requirement is met</i> |
| Cloud Service Provider Reqs | |
| CSP1 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| CSP2 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| CSP3 | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input checked="" type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation: No response</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| CSP4 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| CSP5 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |

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BIDDER NAME: ED TECH SOFT

DATE: 11/03/2025

TA REVIEWER NAME: JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

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| CSP6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of evidence |
| CSP7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Policy cited, but not provided |
| CSP8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| CSP9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| CSP10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Plan and tool cited, but not information provided |
| CSP11 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Tool cited, but no information provided |
| CSP12 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |

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TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

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| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| CSP13 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| CSP14 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation: Plan cited, but not provided</i> |
| NIST Requirements | |
| N1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: No mention of physical access controls</i> |
| N2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| N3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation: SSP cited, but not provided</i> |
| N4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |

STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|--|
| N5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| N6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: BCDR plan cited, but not provided |
| N7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Policy cited, but not provided |
| N10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N11 | Quality of Response: <input type="checkbox"/> Provided a Response <input checked="" type="checkbox"/> Did not provide a response |
| | Explanation: No response provided |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|--|
| N12 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| N13 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| N14 | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation: Not applicable</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 10/7/2025

EVALUATOR NAME: Ida Batista

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Currently vendor for Me's SLDS & student and staff collections
- Level Data was formerly Cedar labs
- Level Data acquired Cedar Labs in Nov 2024
- Not a lot about what Level Data did prior to the acquisition
- Not sure which of the projects started as Level Data or as Cedar Labs
- Hard to get a sense of what is Level Data

2. Subcontractors

- No subcontractors

3. Organizational Chart

- Very generic org chart

4. Litigation

- No litigations

5. Financial Viability

- Dun & Bradstreet – Low to Moderate risk

6. Licensure/Certification

-

7. Certificate of Insurance

- Out of date as of 9/24/2025
- Do they have a current one

II. Proposed Services

1. Technical Assessment

- NIST compliant
- Cloud services
- Works with Me OIT

2. Services to be Provided

- Data collection
- Validation, Certification, & migration
- Integration between data (CEDS)
- Audit management system
- Dashboards
- External user API

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 10/7/2025

EVALUATOR NAME: Ida Batista

EVALUATOR DEPARTMENT: Education

- Visualization
 - Mentioned operational data in lake – not sure this is something we want as data is not stable
 - No clear mention of Me DOE data validation only auto validation
 - Need more information on consolidation of workflow on p 4
 - P6 recipes sounds interesting
 - Did not read mention of dashboard for MEFS
 - P 6-7, what happens w/ multiple certified files, such as audited vs non-audited within same quarter
 - p7 reporting level issues on non-stable data
 - Can SAUs correct lines or must they reupload complete files
 - What about blocked files
 - P8 review presented is backwards : LEA cert prior to DOE cert; not sure if we want it to proceed as such
 - P9 is audit and financial dashboard one and the same?
 - P10 with data duplication which takes precedence
 - Email through outlook or retained in system
 - Natural language query
 - What about table maps and code and about historic codes from the handbook
 - Pg 32 enhancements, what is considered out of scope
 - Pg 42 are they presenting all tools
 - P 42 if LEA has a problem does it go directly to the vendor or thru DOE to vendor?
 -
3. General/Technical Requirements
- Mainly yeses with some customization
 -
 -
4. Implementation – Work Plan
- Timeline is more realistic
 - I like the time they give to onboarding
 - Work with DOE
 - Training is factored in which I like
 - Interesting visualization in charts

III. Demonstrations

-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/5/2025

EVALUATOR NAME: Paula Gravelle

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- P
-
-

2. Subcontractors

- P

3. Organizational Chart

- P

4. Litigation

- P

5. Financial Viability

- No financial data available
- 1 lien

6. Licensure/Certification

-

7. Certificate of Insurance

-

II. Proposed Services

1. Technical Assessment

-

2. Services to be Provided

- P
-
-

3. General/Technical Requirements

- P
-

4. Implementation – Work Plan

- Q – Incremental Approach
-

III. Demonstrations

-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: September 23, 2025

EVALUATOR NAME: Denise Towers

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 20+ years delivering statewide education data solutions
- Multi-State projects – including Maine
- Specialize in education data interoperability

2. Subcontractors

- No Subcontractors

3. Organizational Chart

- Provided positions and position responsibilities

4. Litigation

- No Litigation

5. Financial Viability

- Fair – Moderate credit risk

6. Licensure/Certification

- No additional licensure or credentials

7. Certificate of Insurance

- Received – dated 9/15/25

II. Proposed Services

1. Technical Assessment

- Appeared well prepared to meet our needs

2. Services to be Provided

- Solution for School Finance data collection, review, and tracking:
to include mechanisms for workflows, dashboard views, and
automated notices

3. General/Technical Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: September 23, 2025

EVALUATOR NAME: Denise Towers

EVALUATOR DEPARTMENT: Education

- Can meet requirements; some will be customized

4. Implementation – Work Plan

- Well organized – comprehensive workbook with all details
- Communication
- Detailed timelines

III. Demonstrations

- Provided screen shots of dashboard, system architecture, reports, table details, etc.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/07/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Positive: A well-formed response, in the appropriate format, followed up with practical examples supporting the statements.
- Positive: Longevity/Experience in space while pushing leading edge adoption of SIF, CEDS, etc.
- Positive: Technology - cloud native solutions, focuses on API driven architecture, used with other States
- Positive: Experience with SIS vendors and their integrations
- Positive: Existing relationship with Maine DoE
- Interesting: State of MI seems to be a strong use case example, maybe their strongest. Curious how MI DOE compares operationally to the needs of ME DOE.
- Interesting: Claims of customer success orientation, but continued challenges with ownership and project management with existing engagement. Additional challenges introduced with layoffs of critical team members multiple times occurring during critical time of our engagement and directly contributing to the need to delay implementation.
- Interesting: Proven Results statement is difficult to assess given current challenges in our existing engagement. While the list of states and implementations is impressive, given our current experiences I'm curious about perspectives on how much of the success was due to their leadership and organization.

2. Subcontractors

- Interesting (not negative): While they may not employ sub-contractors, partnership and relationships with existing vendors will require collaboration.

3. Organizational Chart

- Interesting: How does this organizational structure impact or influence the challenges we've been experiencing on the current engagement where it feels as though Product, Engineering and Customer Success collaboration/partnership has been inconsistent at best. Often we hear "oh, that's the other team and we'll have to get them involved but we don't know who to talk to"

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/07/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

4. Litigation
 - Positive: No current or past (5 years) litigation.
5. Financial Viability
 - Negative: History of paying late, but not beyond 90 days
 - Negative: High probability of business failure in next 12 months (Failure Score 34, below average for all business).
 - Negative: Greater than average risk, close monitoring of transactions
6. Licensure/Certification
 - No Comments or Notes – No additional licensure or certifications provided.
7. Certificate of Insurance
 - Certificate of liability insurance provided, no feedback or comments.

II. Proposed Services

1. Technical Assessment
 - Not Met: If selected, bidder would need to provide additional evidence to support information security policies, SBOM, security plan, and SOC2 type 2 report.
2. Services to be Provided
 - Interesting: Downstream Integrations in CEDS format will in practice enable consumption by other users of this data, however practical experience in implementation of this with the Connect platform has demonstrated gaps in process and/or understanding to enable this fully. We are continually challenged with expectations for how this information should be passed into NEO.
 - Interesting: Recipe-based rules engine has involved significant collaboration, re-work, investigation, etc for implementation. This has not been the smoothest process for a multitude of reasons, including miscommunications in expectations for rules.
 - Positive: DOE ownership and management of rules without technical implementation requirements.
 - Question: Is this intended to be a stand-alone software solution independently recognized or will it be a part of the Connect software solution currently being developed/implemented? Are we adding new capabilities/features to the existing solution or creating a new integrated “part.” Much of the wording in the vendor

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/07/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

response implies an LEA familiarity with the Connect platform as a selling point for this software solution.

- Interesting: iii. Allow the Department to verify receipt and completeness of the materials... My perception is that we'd want submissions to be validated before they are submitted not afterwards. Rules to prevent invalid scenarios and not allow the LEA to submit information that is incomplete or inaccurate.
- Positive: The solution appears to be well-rounded and thought out. All services to be provided appear to be existing functionality that requires configuration and rules to be identified, limiting customization via code.

3. General/Technical Requirements

- Negative: Level Data is not currently integrated with NEO, we are still working through this and having challenges that have directly contributed to delays on Project milestones due to continued impediments. Additionally, this is for Student Data submission, there are no current connections for User Access Management as stated in requirement 1.3.1.
- Positive: Strength working with SIF, self-described "leader"
- Interesting: 1.4.1 "... and complying with the deployment certification policies" – This has been challenging at best in the current engagement. While there hasn't been push back in providing the required information (no push for NDA or other confidentiality concerns), conversations on DC started more than half a year ago and continue to be a challenge due to lack of understanding.
- Interesting: 1.4.4: "Level Data currently delivers an automated data interface for the SLDS solution for ME DOE for report generation in eScholar and Generate." The current solution doesn't directly send data to SLDS as this is passed through the NEO system and into Fed Reporting which remains the source for SLDS data. This is a goal/future plan of the project, but not something in place as implied in their response. Additionally, there are files that need to be manually loaded to enable Generate reporting as the fully automated solution has not been delivered.
- Interesting: 1.5.4 is very vague as compared to other responses.
- Positive: WYSIWYG Approach to user defined queries – nice!
- Interesting: Lots of "C" responses 1.7.6 – 1.7.9 as related to older print, forms, mailings, etc. While not a negative this does highlight a

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/07/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

more modern technology approach focus vs. supporting print/mail/etc.

- Negative: While answering “Y” the written response lacks commitment to transaction level SLAs. Understand it’s a balancing act given complexities on what users build but would expect a firmer commitment around application-initiated data-modification transactions in 1.11.6.

4. Implementation – Work Plan

- Interesting: What is provided under Project Management and Workplan section 1 implies a well defined process and support model which is the opposite of our current experiences with miscommunication, lack of coordination and other internal Level Data dynamics that would indicate otherwise. Potential this is due to the experience of those assigned, lack of clarity on expectations, etc. but this should at least be a discussion point as related to selecting a Project Manager for this effort as outlined in section 2.
- Negative: I don’t believe providing Eric Isham as an example of strong PM assignment is a positive. While he may be an excellent certified project manager, we’ve had numerous occasions where I feel accountabilities and expectations should’ve been clarified, and while recently I am seeing more typical Project Management organization around Features/Capabilities, tasks, etc. we’ve had a very difficult time with Level Data’s accountabilities to impediments and continual follow-up topics that appear to have not be understood, captured or managed well. Willing to chalk this up to misunderstandings on ownership of accountabilities, but something to be discussed as part of LD ability to assign an effective PM that understands their methodology and approach.
- Negative: How will LD interact when the customer is not “Agile” with a capital “A”? For instance, we’ve not defined a backlog with features, etc. until very late in the development process (still being defined now). When not operating in this manner it seems to cause challenges for LD.
- Interesting: “In addition, Level Data uses a comprehensive implementation workbook to support end-to-end project tracking and reporting. This workbook includes six interconnected sheets - Dashboard, Tasks, Milestones, Resources, Risks, and Issues— each designed with structured tables, formulas, data validation, and conditional formatting to streamline project management and

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/07/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

- ensure a consistent, transparent view of project health.” If this existed why was it not used for the Connect Project?
- Interesting: For an “Agile” shop they’ve drafted a very phase-gated waterfall based initial project plan, not based on features or capability deliverables but instead phases of a typical project lifecycle. It is difficult to understand the culture and if they really understand the differences in approaches to Product Management Agile deliveries and Waterfall phase-gated Projects. While they do mention a hybrid approach, I’m not seeing very many indications of understanding “Agile” and I’m curious if this may be a factor in our challenges with the current PM assignment and late addition of Project planning artifacts from LD. Additionally, they discuss iterative approaches to testing, delivering capabilities for testing, but the outlined Project plan doesn’t support that (see page 41, #2, for example)
 - Positive: Continual sharing of the desired collaboration and partnership between the Agency and Level Data.
 - Interesting: Do we have Level Data QA Project team members on the existing engagement for Connect? We do not see any testing of solutions prior to hand-off to MaineIT AppDev and it’s causing significant back and forth. I see references to a CI/CD pipeline and automated unit/functional tests, but this can’t be the only testing prior to handing off work to Maine. It’s a positive approach but can’t be the only one. If there are QA team members, where do they reside (organizationally) and how do we ensure they understand the solution sufficiently to effectively test, and to update any automated testing scenarios they may be executing? If there is testing occurring today, it is insufficient. We do not see any artifacts as related to testing, especially those that are defined in the RFP response.
 - Negative: Under testing approach no response or comment specific to adherence with Deployment Certification, or other types of testing outside “functional”
 - Positive: Confidence in statements around security certification of the Connect application. This has been a strong-point in the certification of the Connect application in that all reviews have found full policy compliance.
 - Positive: Strong response as related to capabilities around end-user training: planning and execution.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/07/2025

EVALUATOR NAME: Jeff Verrill

EVALUATOR DEPARTMENT: OIT

- Positive: Strong response on Implementation planning. Curious if this is an accountability outlined in the current engagement for Connect implementation as I am not seeing any effort be placed towards implementation planning, but that could also be occurring directly with the Agency and not inclusive of MainIT AppDev.
- Negative: Additional mention of SLAs for application performance being a goal/target to align and have conversations about if awarded the contract – lack of positive response in ability to achieve shared SLAs.

III. Demonstrations

-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/5/2025

EVALUATOR NAME: Colin Walsh

EVALUATOR DEPARTMENT: RSU 57

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 -
 2. Subcontractors
 - No subcontractors will be used
 -
 3. Organizational Chart
 - Organizational Chart is present – simple but effective.
 - The short version job roles are also described in narrative
 -
 4. Litigation
 - No litigation in past 5 years
 -
 5. Financial Viability
 - The D& B is moderate risk – 1R3
 - Paydex – 67: Delinquency – 78: Failure – 34: Vaibility-2: Data Depth – B: Portfolio –1:
 - 33 employees; 18 years in business
 - No FS provided
 -
 6. Licensure/Certification
 - Only as listed in qualification section of proposal
 -
 7. Certificate of Insurance
 - Hanover Insurance
 - \$2M aggregate general liability - \$10M umbrella

- II. Proposed Services
 1. Technical Assessment
 -
 2. Services to be Provided
 - Real time chart of account verification
 - Will this allow for integration of other data – Ex. Staff data ??
 -

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: 11/5/2025

EVALUATOR NAME: Colin Walsh

EVALUATOR DEPARTMENT: RSU 57

3. General/Technical Requirements

- Listed references are strong and described in detail – ME, MA, MI, Iowa
- They describe the approach as being flexible and being able to change as needs change.
- MA – able to integrate student, staff and behavior data
- MA- flexible and expandable
- I did not see costs listed ??
-

4. Implementation – Work Plan

- Start 7-1-26
- Live 1-18-28
- Seems like a long timeframe – did I misread this timeline?
-

III. Demonstrations

-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

BIDDER NAME: Level Data, LLC

DATE: November 7th , 2025

EVALUATOR NAME: Katherine Warren

EVALUATOR DEPARTMENT: Education

Individual Evaluator Comments:

- I. Organization Qualifications and Experience - Complete
 - 1. Overview of Organization
 - Provided – Iowa & Massachusetts - relevant
 - 2. Subcontractors
 - provided
 - 3. Organizational Chart
 - present
 - 4. Litigation
 - Some small
 - 5. Financial Viability
 - present
 - 6. Licensure/Certification
 -
 - 7. Certificate of Insurance
 - No cyber listed
- II. Proposed Services
 - 1. Technical Assessment
 - Not Met -
 - 2. Services to be Provided
 - P - Complete
 - Audit and PDF's will be new functionality utilizing the ODS and likely the Direct Query functionality
 - Audit Workflow is not really a data collection – Q regarding where the functionality resides within the architecture and will there be a new UI. Did they misunderstand “audit” too ?
 - 3. General/Technical Requirements
 - Met
 -
 -
 - 4. Implementation – Work Plan
 - P- Complete
 -
- III. Demonstrations
 -

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| Consensus Technical Assessment Decision: | |
|---|---|
| Data Compliance | |
| NIST 800-171 | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Strong response wording, no evidence provided |
| Maine FOAA | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Strong response wording, no evidence provided |
| Maine Breach Notification Law | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Strong response wording, no evidence provided |
| NIST 800-53: Rev5 | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Strong response wording, no evidence provided |
| Privacy Act of 1974 | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Strong response wording, no evidence provided |
| U.S. DHHS-OCSE | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Strong response wording, no evidence provided |
| FERPA | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | While answer is "No" understand this is actually "Not Applicable" |
| DPPA | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | While answer is "No" understand this is actually "Not Applicable" |
| MaineIT | |
| H1 | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | No evidence provided |
| H2 | Quality of Response: <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| | |
|---------------------------------------|---|
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| H3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| A1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| A2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| A3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | Evidence lacking in understanding and quality |
| A4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate Response – doesn’t speak to “free from charge” |
| Information Security Standards | |
| S1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| S2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| S3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response of understanding |
| S4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| S5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| Cloud Service Provider Reqs | |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| | |
|-------|---|
| CSP1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| CSP2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| CSP3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| CSP4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| CSP5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| CSP6 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| CSP7 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| CSP8 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| CSP9 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| CSP10 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| CSP11 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| | |
|------------------|---|
| CSP12 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| CSP13 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| CSP14 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| NIST Reqs | |
| N1 | <i>Quality of Response:</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided other than hosting/infrastructure |
| N2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N6 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N7 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | No evidence provided |
| N8 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |

**STATE OF MAINE I.T. RFP TECHNICAL ASSESSMENT
INDIVIDUAL EVALUATION NOTES**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: ED TECH SOFT, INC

DATE: 10/10/2025

EVALUATOR NAME: JEFFREY VERRILL

EVALUATOR DEPARTMENT: DAFS-OIT

| | |
|-----|---|
| N9 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N10 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N11 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N12 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N13 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | Adequate response |
| N14 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | No Response – Nothing Additional |

**STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: LevelData
DATE: 10/01/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

Individual Reviewer Comments:

***For discussion with this bidder: Bidder states they have [multiple] existing relationships with the state and tends to rely on those in many answers as opposed to providing how requirements are addressed. I cannot assume nor vouch for bidder's policies and practices as it relates to the requirements detailed in the technical assessment based on existing relationships and must rely on evidence provided during this technical assessment.**

| Data Compliance | | |
|--|-------------------------------|--|
| Publicly available information | NIST 800-171 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Maine FOAA | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| Confidential Personally Identifiable Information (PII) | Maine Breach Notification Law | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | NIST 800-53: Rev5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Privacy Act of 1974 | Explanation: Weak evidence; bidder cites many control families and domains but no evidence of how these are implemented in policy or practice. |
| | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | Explanation: |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | Explanation: No evidence; requirement not addressed. |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: LevelData
DATE: 10/01/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | | |
|---------------------------|--|---|
| | U.S. DHHS-OCSE | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> <i>Explanation:</i> <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> <i>Explanation: No evidence; requirement not addressed.</i> |
| Student Education Data | Family Educational Rights and Privacy Act: FERPA | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> <i>Explanation: "No" response.</i> <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> <i>Explanation: Marking adequate assuming this requirement is not applicable.</i> |
| Personal Information from | § Driver's Privacy Protection Act (Title XXX) ("DPPA") 18 U.S.C. Chapter 123, §§ 2721 – 2725 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> <i>Explanation: "No" response.</i> <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> <i>Explanation: Marking adequate assuming this requirement is not applicable.</i> |
| MaineIT | | |
| H1 | | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> <i>Explanation:</i> <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| H2 | | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> <i>Explanation:</i> <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| H3 | | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> <i>Explanation:</i> <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| A1 | | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |

**STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: LevelData
DATE: 10/01/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|---------------------------------------|---|
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| A2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| A3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| A4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; requirement compliance not explicitly stated.</i> |
| Information Security Standards | |
| S1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met. *Security Program cited but not provided.</i> |
| S2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; bidder does not explicitly cover sub-contractors (per requirement).</i> |
| S3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation:</i> |
| S4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation:</i> |
| S5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: LevelData
DATE: 10/01/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|------------------------------------|---|
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation:</i> Weak evidence; SBOM cited but not provided. |
| Cloud Service Provider Reqs | |
| CSP1 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation:</i> Weak evidence; requirement not explicitly addressed. |
| CSP2 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation:</i> Weak evidence; requirement not explicitly addressed. |
| CSP3 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation:</i> Weak evidence; lacking in how requirement is met. |
| CSP4 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation:</i> Weak evidence; lacking in how requirement is met. |
| CSP5 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation:</i> Weak evidence; lacking in how requirement is met. |
| CSP6 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation:</i> Weak evidence; lacking in how requirement is met. |
| CSP7 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078

RFP TITLE: DOE FINANCIAL SYSTEM

BIDDER NAME: LevelData

DATE: 10/01/2025

TA REVIEWER NAME: Ben Haschalk

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-------|--|
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| CSP8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| CSP9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| CSP10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| CSP11 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| CSP12 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| CSP13 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | <i>Explanation: Weak evidence; lacking in how requirement is met.</i> |
| CSP14 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | <i>Explanation:</i> |

**STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: LevelData
DATE: 10/01/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|--------------------------|--|
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| NIST Requirements | |
| N1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: "Not Applicable" response. |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: *Security Plans cited but not provided. |
| N4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: |
| N7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |

STATE OF MAINE
INDIVIDUAL REVIEW NOTES - TECHNICAL ASSESSMENT

RFP #: 202505078
RFP TITLE: DOE FINANCIAL SYSTEM
BIDDER NAME: LevelData
DATE: 10/01/2025
TA REVIEWER NAME: Ben Haschalk
TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|--|
| | <p>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</p> <p>Explanation: Weak evidence; lacking in how requirement is met. Comprehensive Security Program cited, but nothing provided.</p> |
| N8 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</p> <p>Explanation: Weak evidence; lacking in how requirement is met.</p> |
| N9 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation:</p> |
| N10 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation:</p> |
| N11 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation:</p> |
| N12 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</p> <p>Explanation: Weak evidence; lacking in how requirement is met. Policies cited but not provided.</p> |
| N13 | <p>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</p> <p>Explanation:</p> <p>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</p> <p>Explanation: *SCRM program cited but not provided.</p> |
| N14 | <p>Quality of Response: <input type="checkbox"/> Provided a Response <input checked="" type="checkbox"/> Did not provide a response</p> |

STATE OF MAINE
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TA REVIEWER DEPARTMENT: MaineIT

| | |
|--|---|
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | <i>Explanation:</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

Consensus Comments - Technical Assessment Team:

| | | |
|---|-------------------------------|--|
| Consensus Decision: <i>Not Met</i> | | |
| Overall quality of response and evidence: <i>If selected, bidder would need to provide additional evidence to support information security policies, SBOM, security plan, and SOC2 type 2 report.</i> | | |
| Data Compliance | | |
| Publicly available information | NIST 800-171 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</i> |
| | Maine FOAA | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> <i>Explanation: No evidence provided</i> |
| Confidential Personally Identifiable Information (PII) | Maine Breach Notification Law | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> <i>Explanation: No evidence provided</i> |
| | NIST 800-53: Rev5 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> <i>Explanation: Weak evidence; bidder cites many control families and domains but no evidence of how these are implemented in policy or practice</i> |
| | Privacy Act of 1974 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | | <i>Explanation:</i> |
| | | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | | |
|---------------------------|--|--|
| | | <i>Explanation: No evidence provided</i> |
| | U.S. DHHS-OCSE | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: No evidence provided</i> |
| Student Education Data | § Family Educational Rights and Privacy Act: FERPA | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation: Not applicable</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation:</i> |
| Personal Information from | § Driver's Privacy Protection Act (Title XXX) ("DPPA") 18 U.S.C. Chapter 123, §§ 2721 – 2725 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation: Not applicable</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | | <i>Explanation:</i> |
| MaineIT | | |
| H1 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Lack of detail</i> |
| H2 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | | <i>Explanation:</i> |
| | | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | | <i>Explanation: Lack of detail</i> |
| H3 | | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|---------------------------------------|---|
| | <i>Explanation:</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |
| | <i>Explanation: Lack of detail</i> |
| A1 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |
| | <i>Explanation: Lack of evidence/details</i> |
| A2 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |
| | <i>Explanation: Lack of evidence/details</i> |
| A3 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |
| | <i>Explanation: Lack of evidence/details</i> |
| A4 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |
| | <i>Explanation: Lack of evidence/details</i> |
| Information Security Standards | |
| S1 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |
| | <i>Explanation: Lack of evidence. Security protocol cited, but no information provided.</i> |
| S2 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak</i> |
| | <i>Explanation: Lack of evidence</i> |
| S3 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| | <i>Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak</i> |
| | <i>Explanation:</i> |
| S4 | <i>Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response</i> |
| | <i>Explanation:</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|------------------------------------|--|
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| S5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: SBOM cited, but not provided |
| Cloud Service Provider Reqs | |
| CSP1 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: not explicitly addressed |
| CSP2 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Not addressed |
| CSP3 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| CSP4 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| CSP5 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| CSP6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |

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BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

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| | <i>Explanation: Lack of detail</i> |
| CSP7 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Lack of detail</i> |
| CSP8 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Lack of detail</i> |
| CSP9 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Lack of detail</i> |
| CSP10 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Lack of detail</i> |
| CSP11 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Lack of detail</i> |
| CSP12 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Lack of detail</i> |
| CSP13 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Lack of detail</i> |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

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| CSP14 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation:</i> |
| NIST Requirements | |
| N1 | Quality of Response: <input type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation: Not applicable</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| N2 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| N3 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| N4 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| N5 | Quality of Response: <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | Quality of Evidence: <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |

**STATE OF MAINE
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RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYADEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

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| N6 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| N7 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Plans cited, but not provided |
| N8 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input type="checkbox"/> Adequate <input checked="" type="checkbox"/> Weak |
| | Explanation: Lack of detail |
| N9 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| N10 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| N11 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |
| | Explanation: |
| | Quality of Evidence: <input type="checkbox"/> Strong <input checked="" type="checkbox"/> Adequate <input type="checkbox"/> Weak |
| | Explanation: Responded with details on how they accomplish the requirement |
| N12 | Quality of Response: <input checked="" type="checkbox"/> Provided a Response <input type="checkbox"/> Did not provide a response |

**STATE OF MAINE
TEAM REVIEW NOTES - TECHNICAL ASSESSMENT**

RFP #: 202505078

RFP TITLE: EDUCATION FINANCE COMPLIANCE AND MONITORING SYSTEM

BIDDER NAME: LEVEL DATA, LLC

DATE: 11/03/2025

TA REVIEWER NAME: JAYDEV NUTAKKI

TA REVIEWER DEPARTMENT: MaineIT

| | |
|-----|---|
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input type="checkbox"/> <i>Adequate</i> <input checked="" type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Plans cited, but not provided. Lack of detail.</i> |
| N13 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |
| N14 | <i>Quality of Response:</i> <input checked="" type="checkbox"/> <i>Provided a Response</i> <input type="checkbox"/> <i>Did not provide a response</i> |
| | <i>Explanation:</i> |
| | <i>Quality of Evidence:</i> <input type="checkbox"/> <i>Strong</i> <input checked="" type="checkbox"/> <i>Adequate</i> <input type="checkbox"/> <i>Weak</i> |
| | <i>Explanation: Responded with details on how they accomplish the requirement</i> |



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202505078**

RFP TITLE: Education Finance Compliance and Monitoring System

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

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

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

I understand 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.

DocuSigned by:
Paula Gravelle
C40B7943SDCE43F...
Signature

9/22/2025
Date



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202505078**

RFP TITLE: Education Finance Compliance and Monitoring System

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

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

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

I understand 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.

DocuSigned by:
Denise Towers
1312C1A3E1AC46B...
Signature

9/23/2025
Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202505078
RFP TITLE: Education Finance Compliance and Monitoring System

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

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

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

I understand 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.

DocuSigned by:
Jeffrey Verrill
0D4E8C2991074CC...
Signature

9/22/2025
Date



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202505078**

RFP TITLE: Education Finance Compliance and Monitoring System

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

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

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

I understand 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.

Signed by:
Colin M. Walsh, CPA
08CE171F38CA44A...
Signature

9/23/2025
Date



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202505078**

RFP TITLE: Education Finance Compliance and Monitoring System

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

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

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

I understand 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.

DocuSigned by:
Katherine Warren
CD4C4393E76349A...
Signature

9/24/2025
Date



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202505078**

RFP TITLE: Education Finance Compliance and Monitoring System

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

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

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

I understand 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.

Signed by:

Ben Haschalk

B14CDE596CB3447...

Signature

9/22/2025

Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202505078

RFP TITLE: Education Finance Compliance and Monitoring System

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

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

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

I understand 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.

Signed by:

Jayadev Nutakki

4A7075E723DF4E5...

Signature

9/23/2025

Date