

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

RFP# 202508113					
<u>Comprehensive Evaluation of State Investments in Economic Development</u>					
<b>Bidder Name:</b>		<b>Center for Regional Economic Competitiveness</b>	<b>DevTech Systems Inc</b>	<b>EBP US Inc.</b>	<b>Ernst &amp; Young LLP</b>
<b>Proposed Cost:</b>		<b>\$789,600</b>	<b>\$735,435</b>	<b>\$708,716</b>	<b>\$788,000</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	N/a	N/a	N/a	N/a	N/a
Section II: Organization Qualifications and Experience	40	32	20	25	35
Section III: Proposed Services	30	20	23	20	26
Section IV: Cost Proposal	30	26.06	27.98	29.04	26.12
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>78.06</u></b>	<b><u>70.98</u></b>	<b><u>74.04</u></b>	<b><u>87.12</u></b>
<b>Bidder Name:</b>		<b>Global Location Strategies</b>	<b>Industrial Economic Inc</b>	<b>OCO Consulting LLC</b>	<b>PFM Group Consulting LLC</b>
<b>Proposed Cost:</b>		<b>\$690,000</b>	<b>\$788,156</b>	<b>\$754,500</b>	<b>\$768,785</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	N/a	N/a	N/a	N/a	N/a
Section II: Organization Qualifications and Experience	40	20	22	22	38
Section III: Proposed Services	30	15	19	15	29
Section IV: Cost Proposal	30	29.82	26.11	27.27	26.77
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>64.82</u></b>	<b><u>67.11</u></b>	<b><u>64.27</u></b>	<b><u>93.77</u></b>

<b>Bidder Name:</b>		<b>TPMA, LLC</b>
<b>Proposed Cost:</b>		<b>\$685,966</b>
<b>Scoring Sections</b>	<b>Points Available</b>	
Section I: Preliminary Information	N/a	N/a
Section II: Organization Qualifications and Experience	40	15
Section III: Proposed Services	30	10
Section IV: Cost Proposal	30	30
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>55.00</u></b>



DEPARTMENT OF  
ECONOMIC AND COMMUNITY DEVELOPMENT

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**1. Purpose**

Through the subject RFP, the Department sought a qualified, professional firm to conduct this evaluation in accordance with the requirements of the statute (5 MRSA § 1370-P) and prepare a report that accurately reflects the results of the evaluation and provides recommendations as defined in this Request for Proposals (RFP) document. This document provides instructions for submitting proposals, the procedure and criteria by which the awarded Bidder will be selected, and the contractual terms which will govern the relationship between the State of Maine (State) and the awarded Bidder.

Per statute (see Appendix F), every four years, the Department is required to perform an evaluation of research and development activities and economic development incentives in the State. The Department must submit the results of this evaluation to the Governor and the Legislature.

It is strongly recommended that Bidders to this RFP read the statute (5 MRSA § 1370-P) thoroughly before bidding on this work.

It is anticipated that Bidders who can show previous experience in evaluating state economic development incentives will receive a higher score. Successful Bidders will demonstrate an understanding of Maine's current economic development incentive programs and how they have recently been adjusted with the shift from Pine Tree Development Zones to the Dirigo Business Incentives Program.

Bidders must also demonstrate an understanding of the broader context of this evaluation, including Maine's 10-Year Economic Development Strategy: The 2024 Reset and the previous evaluations completed.

**2. Evaluation Process**

An evaluation team was composed of three evaluators from the Department of Economic and Community Development. The evaluation team 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.



JANET T. MILLS  
GOVERNOR

MICHAEL A. DUGUAY  
COMMISSIONER

DEPARTMENT OF  
ECONOMIC AND COMMUNITY DEVELOPMENT

### 3. Conditional Awards

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

Vendor Name
PFM Group Consulting LLC

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

### 4. Qualifications & Experience

- Comprehensive incentive evaluation completed for Oklahoma with multiple contract extensions and other relevant project examples
- Team consistency – same individuals that worked on other incentive evaluations on this project
- Significant quantitative and policy skills

### 5. Proposed Services

- Project management piece is straight and to the point; shows their experience doing these types of projects elsewhere.
- They identify specific comparable incentives in other states they have evaluated previously and show strong understanding of how to evaluate incentives

### 6. Cost Proposal

All cost proposals received were below the Department's allocation of \$800,000. PFM Group Consulting LLC submitted a cost of \$754,500.

### 7. Conclusion

Out of 100 possible points, the evaluation team awarded PFM Group Consulting LLC a total score of 93.77. The strength of awarded proposal outweighed the other proposals through a combination of its qualifications and experience and proposed services. The evaluation team determined that the proposal submitted by PFM Group Consulting LLC represents the best value to the State of Maine.



**STATE OF MAINE  
DEPARTMENT OF ECONOMIC AND  
COMMUNITY DEVELOPMENT**



**Janet T. Mills  
Governor**

**MICHAEL A. DUGUAY  
Commissioner**

December 22, 2025

Bob Isaacson  
Senior Vice President for Economic Research & Policy  
Center for Regional Economic Competitiveness  
1700 N. Moore Street, Suite 1500  
Arlington, VA 22209  
Email: [bisaacson@crec.net](mailto:bisaacson@crec.net)

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development

Dear Bob Isaacson:

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

- PFM Group Consulting LLC

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

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

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

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

Sincerely,



Shae McGehee  
Economic Development Incentives Manager  
Office of Business Development  
Maine Department of Economic & Community Development  
Office: 207-624-9875  
Email: [Shae.McGehee@maine.gov](mailto:Shae.McGehee@maine.gov)

### **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).



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Governor**

**MICHAEL A. DUGUAY  
Commissioner**

December 22, 2025

Dr. Rafael Romeu  
President & CEO  
DevTech Systems, Inc.  
2300 Wilson Boulevard Suite 350-A  
Arlington, VA 22201  
Email: [proposals@devtechsys.com](mailto:proposals@devtechsys.com)

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development

Dear Dr. Rafael Romeu:

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

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Office of Business Development  
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Governor**

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Commissioner**

December 22, 2025

Christopher Steele  
EBP US Inc.  
155 Federal Street, Suite 600  
Boston, MA 02110  
Email: [chris.steele@ebp-us.com](mailto:chris.steele@ebp-us.com)

**SUBJECT: Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development**

Dear Christopher Steele:

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

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

Sincerely,



Shae McGehee  
Economic Development Incentives Manager  
Office of Business Development  
Maine Department of Economic & Community Development  
Office: 207-624-9875  
Email: [Shae.McGehee@maine.gov](mailto:Shae.McGehee@maine.gov)

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December 22, 2025

Caroline Sallee  
Ernst & Young LLP  
One Manhattan West, 395 9th Ave  
New York, NY 10001  
Email: caroline.sallee@ey.com

**SUBJECT: Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development**

Dear Caroline Sallee:

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

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Sincerely,



Shae McGehee  
Economic Development Incentives Manager  
Office of Business Development  
Maine Department of Economic & Community Development  
Office: 207-624-9875  
Email: [Shae.McGehee@maine.gov](mailto:Shae.McGehee@maine.gov)

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December 22, 2025

Sarah White  
Global Location Strategies  
310 Mills Ave. Ste. 103  
Greenville, SC 29605  
Email: sarahwhite@glsconsults.com

**SUBJECT: Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development**

Dear Sarah White:

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

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Maine Department of Economic & Community Development  
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December 22, 2025

Daniel J. Kaufman  
Principal  
Industrial Economics Inc.  
2067 Massachusetts Ave., Ste. 4  
Cambridge, MA 02140  
Email: dkaufman@indecon.com

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development

Dear Daniel J. Kaufman:

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

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**MICHAEL A. DUGUAY  
Commissioner**

**Janet T. Mills  
Governor**

December 22, 2025

Ian Hunter  
US Director  
OCO Consulting LLC  
41 E 11th St 11th Floor  
New York, NY 10003  
Email: [ian.hunter@ocoglobal.com](mailto:ian.hunter@ocoglobal.com)

**SUBJECT: Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development**

Dear Ian Hunter:

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

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**MICHAEL A. DUGUAY**  
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**Janet T. Mills**  
Governor

December 22, 2025

Joe Bukshon  
PFM Group Consulting LLC  
1735 Market Street 42<sup>nd</sup> Floor  
Philadelphia, PA 19103  
Email: bukshonj@pfm.com

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development

Dear Joe Bukshon:

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

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Governor**

**MICHAEL A. DUGUAY  
Commissioner**

December 22, 2025

Stephanie Glass Flatten  
TPMA, LLC  
P.O. Box 881011  
Indianapolis, IN 46208  
Email: [sflatten@tpma-inc.com](mailto:sflatten@tpma-inc.com)

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202508113 Comprehensive Evaluation of State Investments in Economic Development

Dear Stephanie Glass Flatten:

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

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Sincerely,



Shae McGehee  
Economic Development Incentives Manager  
Office of Business Development  
Maine Department of Economic & Community Development  
Office: 207-624-9875  
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<b>Bidder Name</b>	Center for Regional Economic Competitiveness
--------------------	--

<b>Date of Team Evaluation</b>	10/29/2025
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**State of Maine**

**Department of Economic and Community Development**

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.Mcgehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Team Evaluation</b>	10/29/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	32
<b>File 3</b>	<b>Proposed Services</b>	30	20
<b>File 4</b>	<b>Cost Proposal</b>	30	26.06
		<b>Total: 100</b>	<b>Total: 78.06</b>



<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 2</b>	
<b>Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	32

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Good reputation as economic development organization in US</li> <li>2. Their experience with the incentive database could be helpful for this evaluation.</li> <li>3. Previous experience included similar work for Missouri and Maryland – upon review of project description, comparison is emphasized rather than evaluation of programs</li> <li>4. Comparable projects for benchmarking</li> <li>5. Acknowledged Maine's industries and priorities, economic development strategy</li> <li>6. Reference their workforce development experience to support State priorities rather than evaluate</li> <li>7. Good description of experience, although could have gone above and beyond and discussed how the state used the results.</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>1. Led recent regional strategic planning effort Maine, it is unclear what they worked on specifically</li> <li>2. Role of this contractor not defined until project timeline</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>1. Team appears competent</li> <li>2. No strong quantitative data/statistical analytics experience</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>1. No litigation</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>1. Presents fairly</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>1. N/a</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>1. Yes</li> </ol>

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	20

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. All aspects of the RFP appear to be addressed. Overall sense is they could get the job done, with the main concern being level of detail. The fact that they proposed multiple sub-reports could be very useful, but that the volume of reports could sacrifice detail.</li> <li>2. References framework from previous evaluation for continuity</li> <li>3. Lacking information regarding data analysis capabilities</li> <li>4. Including additional evaluation components like patent activity, R&amp;D intensity, university partnerships</li> <li>5. Missed understanding of the interim report, does not align with statute/RFP</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. Tasks completed in reasonable time</li> </ol>

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	26.06

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$789,600	x	30	=	26.06

<b>Team Notes</b>	
1. N/a	
2.	

<b>Bidder Name</b>	DevTech Systems Inc
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<b>Date of Team Evaluation</b>	10/29/2025
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**State of Maine**

**Department of Economic and Community Development**

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.Mcgehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	DevTech Systems Inc
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<b>Date of Team Evaluation</b>	10/29/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	20
<b>File 3</b>	<b>Proposed Services</b>	30	23
<b>File 4</b>	<b>Cost Proposal</b>	30	27.98
		<b>Total: 100</b>	<b>Total: 70.98</b>

<b>Bidder Name</b>	DevTech Systems Inc
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	DevTech Systems Inc
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 2 Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	20

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Appears to be a generally capable consulting firm with many big public clients.</li> <li>2. Lack of examples of economic policy evaluation</li> <li>3. Based on project examples, they may do well at the public finance analysis component of the work.</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>1. None</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>1. Under the principal's qualifications: "Advanced degree (Ph.D. or Master's) in Economics, Public Policy, Public Administration, or related field". Why did they copy and paste qualifications from a job description as their own qualifications?</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>1. One noted</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>1. Passable</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>1. ISO 9001 Quality Management System – used for evaluation</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>1. Yes</li> </ol>



<b>Bidder Name</b>	DevTech Systems Inc
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	23

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Evaluation questions demonstrate understanding of RFP and statute</li> <li>2. Repeating the RFP back to us in many parts but describe a reasonable framework for evaluation. They paid attention to the data challenges described and address them.</li> <li>3. Actionable recommendations</li> <li>4. Provided significant context and citations for methodology</li> <li>5. Outlined data security methods</li> <li>6. A lot of elements described; very ambitious—perhaps too ambitious. Ambition may be blunted by data availability.</li> <li>7. Report format follows RFP/statute requirements</li> <li>8. Concern that the proposal is ambitious for the time and resources allotted by the RFP. If they had a track record of performing evaluations of these types of programs in other states, we'd have confidence that they know what they're getting into.</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. Makes sense, may be ambitious</li> </ol>

<b>Bidder Name</b>	DevTech Systems Inc
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	27.98

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$735,435	x	30	=	27.98

<b>Team Notes</b>	
1. N/a	
2.	

<b>Bidder Name</b>	EBP US Inc.
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<b>Date of Team Evaluation</b>	10/29/2025
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**State of Maine**

**Department of Economic and Community Development**

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.McGehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	EBP US Inc.
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<b>Date of Team Evaluation</b>	10/29/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	25
<b>File 3</b>	<b>Proposed Services</b>	30	20
<b>File 4</b>	<b>Cost Proposal</b>	30	29.04
		<b>Total: 100</b>	<b>Total: 74.04</b>

<b>Bidder Name</b>	EBP US Inc.
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	EBP US Inc.
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 2 Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	25

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Previously awarded bidder</li> <li>2. Other than Maine project from last RFP, little relevant experience</li> <li>3. Simplified proposal</li> <li>4. Experience as corporate site selector</li> <li>5. Based in New England</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>1. None</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>1. Familiar with most of the team from prior contract. Again, not much other experience on state-level program evaluations on the core team, outside of the previous Maine contract.</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>1. None</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>1. Passable</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>1. N/a</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>1. Yes</li> </ol>

<b>Bidder Name</b>	EBP US Inc.
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	20

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Note the data limitations and applying lessons learned from previous contract without further explanation on what those lessons are and how they will be applied.</li> <li>2. ROI section seems to misunderstand our focus—it uses job growth as the primary reference point, which is deliberately not the strategic aim given our demographics.</li> <li>3. Missed interim report's review of progress on previous recommendations pursuant to the statute.</li> <li>4. A sensible plan and structure overall. Question potential quality of final results.</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. Concise, makes sense</li> </ol>

<b>Bidder Name</b>	EBP US Inc.
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	29.04

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$708,716	x	30	=	29.04

<b>Team Notes</b>	
1. N/a	
2.	



<b>Bidder Name</b>	<b>Ernst &amp; Young (EY)</b>
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<b>Date of Team Evaluation</b>	10/29/2025
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**State of Maine**

**Department of Economic and Community Development**

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.McGehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	<b><u>Ernst &amp; Young (EY)</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	35
<b>File 3</b>	<b>Proposed Services</b>	30	26
<b>File 4</b>	<b>Cost Proposal</b>	30	26.12
		<b>Total: 100</b>	<b>Total: 87.12</b>

<b>Bidder Name</b>	<b><u>Ernst &amp; Young (EY)</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	<b>Ernst &amp; Young (EY)</b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 2 Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	35

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Previous work with OPEGA mostly successful project</li> <li>2. Strong experience. All three project examples are relevant to this project. However, one note would be that while the projects are all relevant, none are comprehensive evaluations of all of a state's economic development programs, so it's not exactly one-to-one. Instead, it seems to be a portfolio of specific state program evaluations.</li> <li>3. Seems to have strength in tax programs, which is a key part of Maine's portfolio, but not the only part.</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>1. None</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>1. Strong experience on the team, including multiple other state projects. Again, those state evaluation projects are a bit tax heavy.</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>1. One noted</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>1. Private LLP, does not share financial statements to parties other than their partners, principals and lenders. Global successful business.</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>1. N/a</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>1. Yes</li> </ol>

<b>Bidder Name</b>	<b><u>Ernst &amp; Young (EY)</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	26

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Started with prioritization of programs, shows understanding of RFP</li> <li>2. Survey to fill data gaps, may underestimate data challenges</li> <li>3. Strategic alignment index could be helpful for goals of statute</li> <li>4. Economic competitiveness index may be less valuable than focusing on the program evaluation against economic strategy.</li> <li>5. Solid proposal and realistic. Inspires confidence in bidder's ability to deliver on quantitative side, may be light on qualitative side.</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. May have challenge collecting data in time allotted</li> <li>2. Otherwise timeline makes sense</li> </ol>

<b>Bidder Name</b>	<b>Ernst &amp; Young (EY)</b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	26.12

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$788,000	x	30	=	26.12

<b>Team Notes</b>	
1. N/a	
2.	

<b>Bidder Name</b>	<b><u>Global Location Strategies</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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**State of Maine**

**Department of Economic and Community Development**

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.McGehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	<b><u>Global Location Strategies</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	20
<b>File 3</b>	<b>Proposed Services</b>	30	15
<b>File 4</b>	<b>Cost Proposal</b>	30	29.82
		<b>Total: 100</b>	<b>Total: 64.82</b>



<b>Bidder Name</b>	<b><u>Global Location Strategies</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	<b><u>Global Location Strategies</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 2 Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	20

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Site selector experience primarily, no direct experience on incentive evaluation</li> <li>2. Their team's previous Maine project did not include incentive evaluation</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>1. Yes, there are still gaps in experience evaluating incentive programs</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>1. Experience is a step or two removed from the work of this RFP</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>1. None</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>1. Passable</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>1. N/a</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>1. Yes</li> </ol>

<b>Bidder Name</b>	<b><u>Global Location Strategies</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	15

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Covering “non-financial activities” seems to imply they’d be evaluating all state economic development activities, which is not realistic. This does not signal understanding of the work involved in evaluating just the required programs.</li> <li>2. 6-month interval of research does not seem to align with the goals of the RFP</li> <li>3. Significant lack of discussion regarding how they will approach gathering and analyzing the program data, the largest component of the RFP.</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. Work plan may be incomplete</li> </ol>

<b>Bidder Name</b>	<b><u>Global Location Strategies</u></b>
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<b>Date of Team Evaluation</b>	10/29/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	29.82

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$690,000	x	30	=	29.82

<b>Team Notes</b>	
1. N/a	
2.	

<b>Bidder Name</b>	<b><u>Industrial Economics, Inc.</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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**State of Maine**

**Department of Economic and Community Development**

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.McGehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	<b><u>Industrial Economics, Inc.</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	22
<b>File 3</b>	<b>Proposed Services</b>	30	19
<b>File 4</b>	<b>Cost Proposal</b>	30	26.11
		<b>Total: 100</b>	<b>Total: 67.11</b>

<b>Bidder Name</b>	<b><u>Industrial Economics, Inc.</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	<b><u>Industrial Economics, Inc.</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 2 Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	22

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Significant economic analysis experience in the public sector</li> <li>2. Individual personnel experience describes some economic development examples but none of the firm-level examples.</li> <li>3. None of the specific projects listed are related to economic development evaluations or incentive evaluations</li> <li>4. Broken link in project examples</li> </ol>
<b>Subcontractors</b>	1. None
<b>Organizational Chart</b>	1. Good experience among staff, but nothing one-to-one with this work. Almost entirely climate and energy focused.
<b>Litigation</b>	1. None
<b>Financial Viability</b>	1. Sufficient
<b>Licensure/Certification</b>	1. N/a
<b>Certificate of Insurance</b>	1. Included



<b>Bidder Name</b>	<b><u>Industrial Economics, Inc.</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	19

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Included neighboring Canadian provinces as part of peer benchmarking which could be helpful but difficult to execute</li> <li>2. Using AI tools as part of the review in this way may not be helpful. LLMs are still not very good at deterministic analysis to produce new data, which seems to be what they are describing.</li> <li>3. Attention to surveying participants. Filling in data gaps is going to be key for this. That said they reference surveying “grant recipients”—assuming they mean the participants in incentive programs generally, that is a different mindset.</li> <li>4. They discuss addressing “comprehensive ROI” through the rubric analysis as the key deliverable framework, but the proposal could use clearer description of how they will approach and present literal ROI info. They discuss use of IMPLAN, which is good, but that section does not clearly state what they will be looking for and how that fits in to the final analysis.</li> <li>5. Proposed case studies could be valuable information and communication tool</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. Concerns that the survey timeline is likely too short</li> <li>2. No issues otherwise</li> </ol>

<b>Bidder Name</b>	<b><u>Industrial Economics, Inc.</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	26.11

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$788,156	x	30	=	26.11

<b>Team Notes</b>	
1. N/a	
2.	

Bidder Name	<b>OCO Consulting LLC</b>
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Date of Team Evaluation	11/4/2025
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**State of Maine**  
**Department of Economic and**  
**Community Development RFP #**  
**202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.Mcgehee@maine.gov

Evaluation Team	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	<b>OCO Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	22
<b>File 3</b>	<b>Proposed Services</b>	30	15
<b>File 4</b>	<b>Cost Proposal</b>	30	27.27
		<b>Total: 100</b>	<b>Total: 64.27</b>

<b>Bidder Name</b>	<b><u>OCO Consulting LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	<b>OCO Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 2 Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	22

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>Section 1 appears to be AI generated text, does not capture the intention of the statute               <ol style="list-style-type: none"> <li>If they were looking up the Tech Hub program themselves, they would have seen that Maine is also a part of it.</li> <li>They are pitching Dirigo as a solution rather than discussing the incentive evaluation</li> </ol> </li> <li>Works primarily in FDI strategy</li> <li>Current Maine project did not include analysis/evaluation of Maine's incentives, focused on investment attraction strategy</li> <li>One relevant project listed. Described as an incentive benchmarking project, which is related but different than a comprehensive evaluation. They don't seem to describe evaluating the results of the existing programs, i.e., analyzing program data to determine results and if goals were met.</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>BT Strategies – policy intelligence, one firm with 3 project team members that will focus on the policy communication side.</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>Some relevant experience across the project team with incentive reviews in other states. Again, those projects are largely described as benchmarking programs versus other states.</li> <li>Limited quantitative training</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>Not included</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>Passable</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>N/a</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>Included</li> </ol>

<b>Bidder Name</b>	<b>OCO Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	15

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Limited methodology provided for incentive analysis</li> <li>2. Great that they included anticipated challenges and mitigation strategies upfront.</li> <li>3. They describe clear indicators for benchmarking, but those indicators are not exactly aligned with the strategy.</li> <li>4. Concern that the focus on our economic development strategy will be tacked onto an existing methodology instead of the core focus of the project.</li> <li>5. Again, AI may have led them astray in a couple places. No active organizations named “Life Sciences Maine” or “Maine Wind Industry Initiative”. <ol style="list-style-type: none"> <li>a. Wary of the quality of the final products they will produce.</li> </ol> </li> <li>6. Lacking details for the approach to gathering survey responses as this would be a significant part of the project.</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. The person with the most relevant experience is not directly responsible for any of the workstreams. The two responsible for most workstreams have not worked on incentive program evaluation for a state before.</li> </ol>

<b>Bidder Name</b>	<b>OCO Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	27.27

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$754,500	x	<b>30</b>	=	27.27

<b>Team Notes</b>
1. N/a
2.



<b>Bidder Name</b>	<b>PFM Group Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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**State of Maine**

**Department of Economic and**

**Community Development RFP #**

**202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

### **TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.Mcgehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	<b><u>PFM Group Consulting LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/A
<b>File 2</b>	<b>Organization</b>	40	38
<b>File 3</b>	<b>Qualifications and Proposed Services</b>	30	29
<b>File 4</b>	<b>Cost Proposal</b>	30	26.77
		<b>Total: 100</b>	<b>Total: 93.77</b>

<b>Bidder Name</b>	<b><u>PFM Group Consulting LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	<b>PFM Group Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 2</b>	
<b>Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	38

<b>Section</b>	<b>team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Nation's leading independent financial advisor, weighted towards financial analysis</li> <li>2. Almost identical work completed for Oklahoma with multiple contract extensions and other relevant project examples</li> <li>3. Team consistency – same individuals that worked on other incentive evaluations on this project</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>1. Smart Incentives, works on OK project as incentive reviewer, limited information regarding resume/role</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>1. Limited info in chart, PFM Team described in overview, significant quantitative and policy skills</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>1. None</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>1. Sufficient</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>1. N/a</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>1. Included, not project/client specific</li> </ol>

<b>Bidder Name</b>	<b>PFM Group Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	29

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Decent understanding of Maine context including demographics. Clear grasp of some of the challenges one program had, although they didn't see all of the components of it. Still, a good discussion that shows how they think through incentive advantages and disadvantages.</li> <li>2. Project management piece is straight and to the point; shows their experience doing these types of projects elsewhere.</li> <li>3. They identify specific comparable incentives in other states they have evaluated previously and show strong understanding of how to evaluate incentives</li> <li>4. Chamber relationships are smart for information gathering from participants.</li> <li>5. Good discussion about data analysis.</li> <li>6. Mentions Draft report and provided outline</li> <li>7. Able to pull framework from previous work completed for incentives evaluations like OK</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. Timeline limited to end of current FY</li> <li>2. Table is easy to view (good size and understandable)</li> </ol>

<b>Bidder Name</b>	<b>PFM Group Consulting LLC</b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	26.77

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$754,500	x	<b>30</b>	=	26.77

<b>Team Notes</b>	
1. N/a	
2.	

<b>Bidder Name</b>	<b><u>TPMA, LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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**State of Maine**

**Department of Economic and Community Development**

**RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**TEAM CONSENSUS EVALUATION NOTES**

<b>RFP Coordinator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Email</b>	Shae.Mcgehee@maine.gov

<b>Evaluation Team</b>	
<b>Name</b>	Jake Daniele
<b>Name</b>	Phoenix McLaughlin
<b>Name</b>	Shae McGehee

<b>Bidder Name</b>	<b><u>TPMA, LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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### SUMMARY

		<b>Points Available</b>	<b>Points Awarded</b>
<b>File 1</b>	<b>Preliminary Information</b>	N/A	N/a
<b>File 2</b>	<b>Organization Qualifications and Experience</b>	40	15
<b>File 3</b>	<b>Proposed Services</b>	30	10
<b>File 4</b>	<b>Cost Proposal</b>	30	30
		<b>Total: 100</b>	<b>Total: 55</b>



<b>Bidder Name</b>	<b><u>TPMA, LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 1 Preliminary Information</b>	
	<b>Team Notes</b>
<b>Appendix A</b> (Proposal Cover Page)	1. Submitted
<b>Appendix B</b> (Responsible Bidder Certification)	1. Submitted

<b>Bidder Name</b>	<b><u>TPMA, LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 2</b>	
<b>Organization Qualifications and Experience</b>	
<b>Points Available</b>	<b>Points Awarded</b>
40	15

<b>Section</b>	<b>Team Notes</b>
<b>Overview of the Organization</b>	<ol style="list-style-type: none"> <li>1. Good public evaluation experience in general, but only one project example that is fairly relevant. That project description, and the experience section overall, is lacking detail. Appears they have not done this type of comprehensive incentive evaluation before</li> <li>2. Very short response with little detail provided</li> </ol>
<b>Subcontractors</b>	<ol style="list-style-type: none"> <li>1. None</li> </ol>
<b>Organizational Chart</b>	<ol style="list-style-type: none"> <li>1. Lacking experience in incentive evaluations, good economic development experience</li> </ol>
<b>Litigation</b>	<ol style="list-style-type: none"> <li>1. None in last five years</li> </ol>
<b>Financial Viability</b>	<ol style="list-style-type: none"> <li>1. Sufficient</li> </ol>
<b>Licensure/Certification</b>	<ol style="list-style-type: none"> <li>1. N/a</li> </ol>
<b>Certificate of Insurance</b>	<ol style="list-style-type: none"> <li>1. Included</li> </ol>

<b>Bidder Name</b>	<b><u>TPMA, LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 3 Proposed Services</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	10

<b>Section</b>	<b>Team Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Provided high level work plan, more detail needed to demonstrate skills, knowledge, and overall competence.</li> <li>2. Left notes in the final document</li> </ol>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. Sufficient</li> </ol>

<b>Bidder Name</b>	<b><u>TPMA, LLC</u></b>
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<b>Date of Team Evaluation</b>	11/4/2025
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<b>File 4 Cost Proposal</b>	
<b>Points Available</b>	<b>Points Awarded</b>
30	30.00

<b>Scoring Formula</b>						
Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Pro-Rated Score
\$685,966	/	\$685,966	x	30	=	30.00

<b>Team Notes</b>	
1. N/a	
2.	

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Individual Evaluation</b>	<b>10/28/2025</b>
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**State of Maine**

**Department of Economic and Community Development**

*Office of Business Development*

**RFP #202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**INDIVIDUAL EVALUATION NOTES**

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Individual Evaluation</b>	<u>10/28/2025</u>
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>No intro/background on company at beginning.</p> <p>2023 = Statewide program Eval for Missouri Department of Economic Development and Nebraska DED. In both held over 50+ stakeholder interviews. In 2025 doing short projects with CT+VT</p> <p>State Economic Development Executives (SEDE) Network Council for Community and Economic Research (C2ER) Among others</p> <p>Mentions 10 yr strategic plan reset (positive)</p> <p>Competent in benchmarking</p>
<b>Subcontractors</b>	<p>EntreWorks Consulting Since 2002, From VA Worked with 46 states</p> <p>Didn't reference which Maine</p>

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Individual Evaluation</b>	<b><u>10/28/2025</u></b>
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	Is there a data person?
<b>Organizational Chart</b>	<p>Bob Isaacson is project director. Worked for Mn Department of Employment and Economic Development.</p> <p>Project Manager and subcontract underneath with three analyst reporting. Paul Liu (Project Manager will be leadership on project)</p> <p>Six people named in total.</p>
<b>Litigation</b>	None
<b>Financial Viability</b>	Audited (presents fairly).
<b>Licensure/Certification</b>	None
<b>Certificate of Insurance</b>	Yes

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Individual Evaluation</b>	<u>10/28/2025</u>
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Cover page is a nice touch</p> <p>First sentence of Scope of Services (pg 5) sounds like AI?</p> <p>References EBP framework for evaluation (Positive)</p> <p>Listed all the programs</p> <p>References Statutory Requirements and their provided outputs.</p> <p>Has two databases management by the company for benchmarking</p> <p>Will confirm alignment to 10 year plan (and reset)</p> <p>A little lacking in detail.</p>
<b>Implementation – Work Plan</b>	<p>References the major milestones. Graph is reasonable to review and makes sense fairly quickly. Lacks details but the months and timeline of each is understandable. Completion months are highlighted.</p> <p>Each task is assigned to a person. No support person referenced for task.</p> <p>Note that subcontract work is still responsibility of applicant.</p> <p>Second page after graph is helpful. Deliverables with clearly identified specific dates. (Positive)</p>



<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Individual Evaluation</b>	10/23/25
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**State of Maine**

**Department of Economic and Community Development**

**Office of Business Development**

**RFP# 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

**INDIVIDUAL EVALUATION NOTES**

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Individual Evaluation</b>	10/23/25
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• One of the better-positioned and better-known economic development organizations in the U.S.</li> <li>• Their experience with the incentive database could be helpful for this evaluation.</li> <li>• Not sure exactly how the professional networks they run would be leveraged for this project, but it is a sign of the strong knowledge base and access they have in the industry.</li> <li>• Fine discussion of Maine’s landscape.</li> <li>• Some directly relevant experience doing this type of work in other states, especially the Missouri project. Nebraska project relevant but slightly different.</li> <li>• That said, while they have some relevant experience, they don’t describe a background of repeated projects like this. A few relevant projects, but not exactly sweeping the nation with this type of work.</li> <li>• Good description of experience, although could have gone above and beyond and discussed how the state used the results.</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>• I want more description of the projects this subcontractor has done.</li> <li>• Not clear exactly what value add will be coming from having this one subcontractor on board. Seems like mostly an advisory role? <ul style="list-style-type: none"> <li>○ This is made clearer in the project timeline later on.</li> </ul> </li> </ul>
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>• Team seems strong.</li> <li>• I could use more specificity about what each person will be doing. Who is going to be DECD’s primary contact and running the project day-to-day? <ul style="list-style-type: none"> <li>○ Based on the project timeline, it seems like the subcontractor will be the primary contact.</li> </ul> </li> </ul>
<b>Litigation</b>	-
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>Date of Individual Evaluation</b>	10/23/25
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• They hit the right notes in terms of the high level project needs</li> <li>• Saying they'll continue the prioritization approach</li> <li>• Mostly repeating language from the RFP and last evaluation back to us. Nothing wrong with that; the general approach makes sense. However, to get to the next level of proposal quality, they could have described how they might approach one of the specific program evaluations in more detail.</li> <li>• The technology competitiveness piece is a potential highlight. If done well, this could be really useful. However, it's not totally clear to me that they'd be able to spend the time breaking down firm dynamics enough to make the case for cause and effect between econ dev investments and "innovation capacity". Still, it could be great if they do.</li> <li>• All aspects of the RFP appear to be addressed. My overall sense is they could get the job done, with my main concern being level of detail. The fact that they proposed multiple sub-reports could be very useful, but I would be concerned that the volume of reports could sacrifice detail.</li> </ul>
<b>Implementation – Work Plan</b>	No issues

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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**State of Maine**

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**Comprehensive Evaluation of State Investments in Economic Development**

**INDIVIDUAL EVALUATION NOTES**

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• Previous experience included similar work for Missouri and Maryland – upon review of project description, comparison is emphasized rather than evaluation of programs</li> <li>• Contractor for Maine R&amp;D comp eval 2008-2012</li> <li>• Manage national database of state incentives and state expenditures – not clear where data from state expenditures is sourced</li> <li>• Acknowledged Maine's industries and priorities, econ strategy but reference their workforce development experience to support these priorities rather than evaluate</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>• Led recent regional strategic planning effort Maine, it is unclear what they worked on specifically</li> </ul>
<b>Organizational Chart</b>	Competent, no strong quantitative data/statistical analytics
<b>Litigation</b>	No litigation
<b>Financial Viability</b>	Financial reports
<b>Licensure/Certification</b>	N/a
<b>Certificate of Insurance</b>	Included

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Center for Regional Economic Competitiveness
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ol style="list-style-type: none"> <li>1. Comp. Eval. <ol style="list-style-type: none"> <li>a. Shows some understanding of previous eval., will use similar framework to select programs for eval</li> <li>b. Flowchart methodology aligns with needs of RFP</li> <li>c. Looking for more information regarding data analysis capabilities</li> <li>d. Demonstrated ability to benchmark</li> <li>e. Including additional evaluation components like patent activity, R&amp;D intensity, university partnerships</li> </ol> </li> <li>2. Reports <ol style="list-style-type: none"> <li>a. Uses outline based on statute for final report</li> <li>b. Missed understanding of the interim report, does not align with statute/RFP</li> <li>c. Collaboration with DECD, legislators, other state leaders</li> </ol> </li> </ol>
<b>Implementation – Work Plan</b>	Tasks completed in reasonable time

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	DevTech Systems Inc
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<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	DevTech Systems Inc
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>Cover page has no cover letter.</p> <p>Mission driven company – but what is the mission (Question)</p> <p>Founded in 1984 in Virginia. Worked with Puerto Rico Gov, Departmetn of State. City of Baltimore.</p> <p>No examples of work in the incentive (economic development) area(Negative)</p>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	<p>State of Maine listed at top.</p> <p>Principal Investigator and POC Dr Pineda. Two quantitative specialists and two data analysts. No others listed, seems very data specific.</p>
<b>Litigation</b>	Received
<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	ISO 9001 Quality Management System.
<b>Certificate of Insurance</b>	Included



<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	DevTech Systems Inc
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Mentions the 10 year plan reset.</p> <p>Mentions FAME, MVF, MITC but no one else from the ecosystem. (Negative)</p> <p>Feels a bit boilerplate rather than Maine specific.</p> <p>CLEARLY DATA SPECIFIC FIRM – mention tableau, Stata, Python, R. Atlas.ti, Kumo.</p> <p>Will also conduct case studies (4-6) on an industry level to examine how public investments shape competitiveness (INTERESTING)</p>

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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	<b>Department</b>	Economic and Community Development

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<b>Implementation – Work Plan</b>	<p>Hard to see graphics. Bullet points are well defined for timeline. Early graphs are not easy to understand.</p> <p>Full graph is not laid out in a way that is intuitive! Numbers at the top are sideways. Responsibility is to a position and almost always the same positions are listed for every item. (NEGATIVE)</p> <p>Phase 3 seems to be laid out better and makes sense. Bullets are easier to follow and manageable chunks.</p>
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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	DevTech Systems
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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	DevTech Systems
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• Sounds like a generally capable consulting firm with many big public clients.</li> <li>• The example projects are very interesting but not relevant to this project. No examples given of economic development policy evaluation.</li> <li>• Based on project examples, they may do well at the public finance analysis component of the work.</li> </ul>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>• Chart is straightforward and makes sense</li> <li>• This gives me pause, under the principal's qualifications: "Advanced degree (Ph.D. or Master's) in Economics, Public Policy, Public Administration, or related field". Why did they copy and paste qualifications from a job description as their own qualifications? <ul style="list-style-type: none"> <li>○ The qualifications for all the staff are like this. Why?</li> </ul> </li> </ul>
<b>Litigation</b>	One noted
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• They describe a rigorous approach.</li> <li>• Repeating the RFP back to us in many parts, but describe a reasonable framework for evaluation. They paid attention to the data challenges described and address them.</li> <li>• A lot of elements described; very ambitious—perhaps too ambitious. I think some of that ambition may be blunted by data availability.</li> <li>• Curious what they would come up with for the “strategic alignment index”</li> <li>• Impressed overall with their proposed services. Interesting ideas and good detail on methodology.</li> <li>• My main concern is that the proposal strikes me as ambitious for the time and resources allotted by the RFP. If they had a track record of performing evaluations of these types of programs in other states, I would be more comfortable that they know what they’re getting into.</li> </ul>
<b>Implementation – Work Plan</b>	Makes sense

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• Economics practice, data solutions practice, skills &amp; workforce development practice, monitoring, evaluation, research and learning practice</li> <li>• Evaluation with technical skills and collaboration</li> <li>• Baltimore – benchmarking, fiscal analysis, strategic workforce insights, data vis.; unclear why Ernest and Young is listed along side city as client</li> </ul>
<b>Subcontractors</b>	No subs
<b>Organizational Chart</b>	Competent – significant quantitative data analysis skills
<b>Litigation</b>	Yes, currently in lit for breach of contract with Jurist Legal Solutions
<b>Financial Viability</b>	Submitted
<b>Licensure/Certification</b>	Evaluation system
<b>Certificate of Insurance</b>	Included

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Evaluation questions demonstrate understanding of RFP and statute</li> <li>• Actionable recommendations</li> <li>• Provided significant context and citations for methodology</li> <li>• Outlined data security methods</li> <li>• Acknowledgement of study limitation and mitigation</li> <li>• Report format follows RFP/statute requirements</li> </ul>
<b>Implementation – Work Plan</b>	Meets RFP/statutory requirements



<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	EBP
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<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	No cover letter Founded in Boston in 1996. Joined with EBP global in 2015. Multiple Evals in Maine Worked with Shae on evaluating 23 of Maine's Economic Development Programs. Collaborating with 6 departments.
<b>Subcontractors</b>	Not Answered (NEGATIVE)
<b>Organizational Chart</b>	Love when they put the State of Maine at the top. Clear that Jane Haines is our contact as the project manager. Two people under and Chris Steele is level. Only 4 listed Clear and easy to understand Bios of each.
<b>Litigation</b>	None
<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	Not Answered? (NEGATIVE)
<b>Certificate of Insurance</b>	Yes

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	EBP
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Mentions 10 year plan but not reset.</p> <p>Speaking of work with state in past 2025 report made suggestions and guidelines to get to states goals.</p> <p>Draw on experience of working with the State (positive)</p> <p>Specifically mentions three goals from 10 year plan (attract 75k people, increase value of sold/worker 10%, grow wages 10%)</p> <p>Nice they answered the questions from the RFP by number.</p> <p>How much is DECD work and how much is contractor? I appreciate assistance but worried about our staff time.</p> <p>Expanding on existing is the recurring theme.</p>

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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<b>Implementation – Work Plan</b>	<p>Very concise. Does indicate team lead for about 10 tasks with support on 4 of those. Feels very simplified with only the two deliverables indicated.</p> <p>Does not give details about how things will flow together or progress. (Negative)</p> <p>In context with the breakouts from the proposed services it is more evident what they are working on in each category.</p>
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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	EBP US Inc.
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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	EBP US Inc.
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Familiar with their work since they were the previous awarded bidder</li> <li>The Maine project from the last RFP is the only listed example that is directly comparable to this project. The rest are for smaller jurisdictions, with only one other about incentive design, and none that seem to be program evaluation in the same way. I'd consider this a weak to moderate match for the desired experience if it weren't for the Maine example.</li> </ul>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>Familiar with most of the team from prior contract. Again, not much other experience on state-level program evaluations on the core team, outside of the previous Maine contract.</li> </ul>
<b>Litigation</b>	-
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	EBP US Inc.
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Good understanding of the Maine context.</li> <li>• It references throughout that they will apply lessons learned from previous contract, but I don't see further explanation of what those lessons are and how they will be applied. This is not an easy data environment to work with, as the bidder knows, and I expected some notes on how they will address that.</li> <li>• ROI section seems to misunderstand our focus—it uses job growth as the primary reference point, which is deliberately not the strategic aim given our demographics. That's as much a note for myself as for the bidder if that didn't come through over the past 4 years of work. Programs need to be measured against their goals, not a catch-all of job growth.</li> <li>• A sensible plan and structure overall. The notes above give me some hesitation about potential quality of final results.</li> </ul>
<b>Implementation – Work Plan</b>	Largely makes sense

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Completed previous evaluations for Maine</li> <li>Experience as corporate site selector</li> <li>Based in New England</li> <li></li> </ul>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	Competent, includes data analysis skills
<b>Litigation</b>	No litigation
<b>Financial Viability</b>	Included
<b>Licensure/Certification</b>	N/a
<b>Certificate of Insurance</b>	Included

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	EBP
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Incorporated lessons learned from previous evaluations</li> <li>• Demonstrates understanding of RFP/statute</li> <li>• References collaboration with relevant Maine organizations</li> <li>• Missed interim report's review of progress on previous recommendations</li> <li>• Demonstrates knowledge of Maine econ strategy</li> <li>• Acknowledges limitations of available data for benchmarking and proposes additional data to contextualize</li> <li>• ROI analysis – includes broad description of method</li> </ul>
<b>Implementation – Work Plan</b>	Reasonable and meets statutory requirements

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Ernst & Young (EY)
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<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Ernst & Young (EY)
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>Starting with a letter is a nice touch (positive)</p> <p>Description of project show the peer states of Arkansas, Georgia, Mississippi and Texas for paper manufacturing and CA, CT, Mississippi and Virginia for ship/boat building.</p> <p>Shows many logos of State and Local Govs they have worked on (positive)</p> <p>Opega summarized Eys findings in report to Leg.</p>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	Hard to tell who is in charge. Shows three departments at same level. Eight people listed total.
<b>Litigation</b>	Included
<b>Financial Viability</b>	No Statements
<b>Licensure/Certification</b>	Individual Team qualifications
<b>Certificate of Insurance</b>	Yes

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Ernst & Young (EY)
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Strategy Mapping – Interesting way to phrase it</p> <p>Logic Model Development – Interesting term. Show the logic model for MTI which is a nice local touch.</p> <p>Stakeholder – only shows FAME, MTI, MVF, MITC. Not researched (Negative).</p> <p>Indicates milestones. Final evaluation they made a point to say EY branded (interesting)</p> <p>Says will meet the deadlines</p>
<b>Implementation – Work Plan</b>	<p>Graph is all on one page with four phases. Hard to read, hard to understand what is happening when. (negative)</p> <p>Font is too small. (negative)</p> <p>Indicates team member assigned</p> <p>Deliverables are clearly marked.</p> <p>Many additional provisions</p>

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Ernst &Young LLP
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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Ernst &Young LLP
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Strong experience. All three project examples are relevant to this project. However, one note would be that while the projects are all relevant, none are comprehensive evaluations of all of a state's economic development programs, so it's not exactly one-to-one. Instead, it seems to be a portfolio of specific state program evaluations.</li> <li>Seems to have a strength in tax programs, which is a key part of Maine's portfolio, but not the only part.</li> </ul>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>Strong experience on the team, including multiple other state projects. Again, those state evaluation projects are a bit tax heavy.</li> </ul>
<b>Litigation</b>	Noted
<b>Financial Viability</b>	Double check this requirement
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Ernst &Young LLP
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Glad they describe clear prioritization right off.</li> <li>• Research planning section is simple and sensible. Hits the right components they'll need to address and is grounded in likely limitations in terms of time and data.</li> <li>• They mention filling data gaps via a survey, which is right but I sense they may be underestimating how much of that they will need to do.</li> <li>• Mapping the needed data collection to the logic models is key—glad they set it up that way.</li> <li>• I'm curious to see what they would do for the strategic alignment index. That could be helpful.</li> <li>• Less interested in the economic competitiveness index. I get how that aligns with the RFP, but we can look up variations of that idea online if we want. Somewhat skeptical about measuring X or Y potential program change by some sliced and diced economic stats. That said, maybe they'll find a useful way to do it. More interested in evaluating programs against their goals and those goals against the strategy, which they address elsewhere.</li> <li>• Overall a solid and realistic proposal. I get the sense that it would be strongest on the quantitative side, and perhaps a bit light on the qualitative side, but that may complement DECD's existing knowledge well.</li> </ul>
<b>Implementation – Work Plan</b>	<ul style="list-style-type: none"> <li>• They put the interim report in the wrong spot on the timeline but use the correct date throughout the text.</li> <li>• I wonder if they will be able to get all the data they need in the time allotted. Plus, they show it as all done in one phase in 2026—but there would be more program data available to roll in by the time the final report is due in 2029. That may be a nuance to discuss if awarded.</li> <li>• Otherwise, the timeline makes sense.</li> </ul>



<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Ernst & Young (EY)
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<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Ernst & Young (EY)
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Recent work with OPEGA – quantitative data analysis</li> <li>Multi-disciplinary capabilities</li> <li>List of methods of evaluation</li> </ul>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	Competent
<b>Litigation</b>	Yes
<b>Financial Viability</b>	Not included
<b>Licensure/Certification</b>	N/a
<b>Certificate of Insurance</b>	Included

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	Ernst & Young (EY)
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Started with prioritization of programs, shows understanding of RFP</li> <li>• Survey to fill data gaps, may underestimate data challenges</li> <li>• Strategic alignment index could be helpful for goals of statute</li> <li>• Economic competitiveness index may be less valuable than focusing on the program evaluation against economic strategy.</li> <li>• Solid proposal and realistic. Inspires confidence in bidders ability to deliver on quantitative side, may be light on qualitative side.</li> </ul>
<b>Implementation – Work Plan</b>	<ol style="list-style-type: none"> <li>1. May have challenge collecting data in time allotted. Otherwise timeline makes sense</li> </ol>

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Global Location Strategies
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<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>Initially formed in 1970 (fortune 500 engineering/construction company). Spun out in 2009.</p> <p>Project manager (Abey Merrill) used to work for OCO Global and did the investment ecosystem review with Beyond Borders Development Group (Interesting)</p> <p>No statistical analysis.</p>
<b>Subcontractors</b>	<p>Beyond Borders Development Group Women owned small business. Specialize in strategic trade, investment, and capacity building</p> <p>Founders (Callie and Joe) worked with DECD on investment ecosystem review in 2024.</p> <p>Have worked with other state EDOs (Maryland, Business Oregon etc).</p>
<b>Organizational Chart</b>	<p>Abbey Merrill is project manager and point of contact. Subcontractors report to her and with no other support staff listed.</p> <p>Leads broken down regarding quality assurance, activities and programs, benchmark model, project manager</p>
<b>Litigation</b>	None

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Global Location Strategies
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<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	No response
<b>Certificate of Insurance</b>	provided

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	Global Location Strategies
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Broken out into 5 tasks based on our 4 criteria in RFP (1+1B, 2,3,4)</p> <p>Slides based presentation gives detail about each task (positive) Mock up examples are a little confusing as they are not relevant other than as an example.</p> <p>Included Maine Outdoor Brands, Maine Made, Maine &amp; Co (Interesting)</p> <p>Telephone or online survey – multiple choice</p>
<b>Implementation – Work Plan</b>	<p>Very detailed and thus small font. Each Task has many tasks broken out with clear month to month progress. Including specific lead and support personnel.</p> <p>Web conference and face to face meetings are highlighted on the graph giving a helpful representation (POSITIVE).</p> <p>Organizing by task based on RFP criteria feels streamlined and understandable.</p>

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Good experience, but seemingly more centered on site selection and related work, which is different from what this RFP is after. The projects they describe are in a broadly similar realm—economic development research and analysis for state governments—but slightly different than what this RFP is about, which is program evaluation for a broad set of activities.</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>Again, good investment attraction experience, but not specifically policy evaluation.</li> </ul>
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>Again, good experience a step or two removed from the type of project work this RFP involved. Not seeing anything about evaluating a state statutory program.</li> </ul>
<b>Litigation</b>	-
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Covering “non-financial activities” seems to imply they’d be evaluating all state economic development activities, which is not realistic. <ul style="list-style-type: none"> <li>◦ They double down on this later on. Not a good sign of understanding the work that will be involved in evaluating just the required programs.</li> </ul> </li> <li>• Not sure I totally understand the structure. They’ll do multiple 6-month cycles of research? Will they be doing a little bit of research on all programs in that time or split up the program review into batches?</li> <li>• Their split of work across the tasks doesn’t exactly align with the tasks as described in the RFP. Not sure why the peer state benchmarking is moved into Task 2. Maybe that’s not a problem, but it’s odd.</li> <li>• I’m skeptical of approaches that distill everything down into one index for comparison across states. The traffic light dashboard may or may not be helpful.</li> <li>• Shockingly little discussion of how they will approach gathering and analyzing the program data, which is likely going to be the largest component of this project. I think they may have misunderstood what DECD is after with this RFP.</li> </ul>
<b>Implementation – Work Plan</b>	<ul style="list-style-type: none"> <li>• Not making sense to me. They’ll be doing a couple months of data analysis total over 4 years? Maybe there’s a page missing?</li> </ul>

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• Site selector experience primarily, no direct experience on incentive evaluation</li> <li>• Their team's previous Maine project did not include incentive evaluation</li> </ul>
<b>Subcontractors</b>	Yes, more of the same type of experience in investment attraction
<b>Organizational Chart</b>	Lacks experience in state incentive evaluations
<b>Litigation</b>	None
<b>Financial Viability</b>	Included
<b>Licensure/Certification</b>	N/a
<b>Certificate of Insurance</b>	Yes

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Covering “non-financial activities” seems to imply they’d be evaluating all state economic development activities, which is not realistic. This does not signal understanding of the work involved in evaluating just the required programs.</li> <li>• 6-month interval of research does not seem to align with the goals of the RFP</li> <li>• Significant lack of discussion regarding how they will approach gathering and analyzing the program data, the largest component of the RFP.</li> </ul>
<b>Implementation – Work Plan</b>	Work plan may be incomplete

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

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<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>Cambridge Ma founded in 1981. Evals for SBA, EPA, US DOL, Colorado Energy Office, World Bank Climate Investment Fund eval.</p> <p>Daniel Kaufman is project director. Indicates has worked with MA, NY, CO, CA. Dr. Emma Fox is project manager.</p>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	<p>Kaufman is principal. Dr Fox is day to day project manager. Clearly identifies 9 support staff broken down by data review/collection and then the analysis team. (positive)</p>
<b>Litigation</b>	None
<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	None
<b>Certificate of Insurance</b>	Provided

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Mentions Three strategic goals from 10 year plan. Positive</p> <p>Social Network Analysis, Barriers and Opportunities, Rubric Based Assessment.</p> <p>Mentions followup interviews with investment recipient and unsuccessful applicants (positive).</p> <p>to inform the secondary data review.” (Interesting)</p> <p>IMPLAN based regional economic impact analysis (interesting)</p>
<b>Implementation – Work Plan</b>	<p>Regular monthly written updates and offered scheduled monthly check in. Quarterly with broader DECD team (Positive)</p> <p>Final report to DECD by January 12, 2029 to be reviewed before submitted on time for Feb 1 deadline. IEc available to travel to Augusta for present final results.</p>



<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
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	<p>Time line graphic is basic. Tasks not assigned (Negative). Hard to view exact timeline in terms of which month.</p> <p>Project management tools like Microsoft planner.</p>
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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Strong public sector evaluation experience. However, none of the specific listed projects are related to economic development evaluations, let alone incentive evaluations. Somewhat odd, since the individual personnel experience describes some economic development examples. But none of the firm-level examples. I wonder if the three examples are standard ones they pull from for RFPs—one of the links provided is broken, so perhaps they are old.</li> </ul>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>Good experience among staff, but nothing one-to-one with this work. Almost entirely climate and energy focused.</li> </ul>
<b>Litigation</b>	-
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Methods overall make sense.</li> <li>• Like that they include neighboring Canadian provinces as part of peer benchmarking. That could be helpful, although difficult to get right.</li> <li>• They describe using AI tools as part of the review in a way that I'm not sure would be helpful. LLMs are still not very good at deterministic analysis to produce new data, which seems to be what they are describing. Not a big issue, but only gives me pause if they think they will save staff time that way.</li> <li>• Like the good amount of attention to surveying participants. Filling in data gaps is going to be key for this. That said they reference surveying "grant recipients"—assuming they mean the participants in incentive programs generally, that is a different mindset.</li> <li>• I also appreciate specifically saying they will interview unsuccessful applicants.</li> <li>• The social network analysis is intriguing but may be of limited use. It would be helpful to get more definitive info on the full suite of programs business use and how they got connected to them, which is in itself an important evaluation point. That's not quite what they describe though.</li> <li>• They discuss addressing "comprehensive ROI" through the rubric analysis as the key deliverable framework, but the proposal could use clearer description of how they will approach and present literal ROI info. They discuss use of IMPLAN, which is good, but that section does not clearly state what they will be looking for and how that fits in to the final analysis.</li> </ul>
<b>Implementation – Work Plan</b>	<ul style="list-style-type: none"> <li>• Survey timelines are likely too short. I'm not sure they've given enough time for the data collection aspects of the work in general.</li> <li>• No issues otherwise.</li> </ul>

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Based in MA</li> <li>Significant economic analysis experience</li> <li>Limited policy experience in example projects, no incentive evaluation projects</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>None</li> </ul>
<b>Organizational Chart</b>	Likely capable given skillset but team experience is in energy projects, not economic development policy and incentive evaluation
<b>Litigation</b>	None
<b>Financial Viability</b>	Included
<b>Licensure/Certification</b>	N/a
<b>Certificate of Insurance</b>	Included

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Social network analysis – unclear how helpful this information will be to meets the goals of the RFP</li> <li>• Barrier &amp; opportunities analysis – aligns with needs of RFP</li> <li>• Rubric-based assessment – structured evaluation</li> <li>• Case studies – 5 funding recipients, adding this information into the report would be helpful for communications</li> </ul>
<b>Implementation – Work Plan</b>	Reasonable amount of time, meets statutory deadlines

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

<b>Applicant Name</b>	OCO Consulting LLC
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<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>Uses Maine silhouette with pictures from DECD plan (Positive)</p> <p>opening statement – Positive</p> <p>Reset and plan call for agile. Competitive bar of US landscape has risen because of CHIPs, Science Act, IRA, Tech Hubs.</p> <p>Mentions NH/VT Tech Hub. MA and CT R&amp;D tax credit. Indiana comp review, Pennsylvania Strategic Investment Assement.</p> <p>Compares Dirigo to Chips, IRA etc. Identifies Maine key areas.</p> <p>OCO global founded in 2001 and trading in US since 2007. Worked with Business Oregon to deliver fiver year foreign direct investment</p> <p>History with Maine since 2024 -Design and delivery of investment attraction and lead generation strategy (extended through 2025-2026.</p> <p>Also worked with MITC</p>
<b>Subcontractors</b>	<p>BT Strategies – US based comms and public affairs advisory</p> <p>Owned by Barnes &amp; Thornburge (“one of largest law firms in US).</p>

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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	Collaborated since 2024
<b>Organizational Chart</b>	Shows Maine on top (positive) Cleary identifies contractors. Everyone mentioned by name. Indicated core project team  Ian Hunter is project director. Done Projects in North America, UK, Asia etc. Experience with Oregon, Pennsylvania, Maine DECD
<b>Litigation</b>	Is this provided?
<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	Is this provided?
<b>Certificate of Insurance</b>	Yes

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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	<b>Department</b>	Economic and Community Development

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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Clearly outlined phases.</p> <p>Identifies potential challenges, importance, and mitigation strategy in table (positive)</p> <p>Use state level data before national proxies.</p> <p>Positive that DECD has choice</p> <p>Table on page 10 indicates stakeholder groups (including example participants like Roux institute etc) and purpose of engagement). But, some of the referenced groups do not exist (NEGATIVE)</p>
<b>Implementation – Work Plan</b>	<p>Three phases (plus phase 0) with sub phases broken down. Graph follows a logical progression with owner of each task personally assigned (positive).</p> <p>Quarter coordination meetings with DECD, FAME, MVF, MITC Consultant bi weekly check ins (OCO and BT = non DECD)</p> <p>Identifies draft due dates</p>

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
	<b>Title</b>	Director of Strategy Implementation
	<b>Department</b>	Economic and Community Development

<b>Bidder Name</b>	OCO Consulting LLC
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**State of Maine**

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<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• While I'm sure all of these proposals are using LLMs to generate or review text to some extent, this introduction seems especially so. If they were looking up the Tech Hub program themselves, they would have seen that Maine is also a part of it. The first 2.5 pages are fluff and could be tossed out. Not a good start.</li> <li>• Good that they have experience doing investment analysis and review for Maine and Oregon. Odd that the Maine experience is not then listed as one of the specific referenced projects. Not quite the same kind of work regardless.</li> <li>• Interesting that they say they have a database where they continuously model state incentive program value.</li> <li>• One relevant project listed. Described as an incentive benchmarking project, which is related but different than a comprehensive evaluation. They don't seem to describe evaluating the results of the existing programs, i.e., analyzing program data to determine results and if goals were met.</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>• One firm with 3 project team members that will focus on the policy communication side. Not an exact arrangement I've seen before, but no issue with it.</li> </ul>
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>• Some relevant experience across the project team with incentive reviews in other states. Again, those projects are largely described as benchmarking programs versus other states.</li> <li>• Comparing to the project timeline later on, I notice that the person with the most relevant experience is not directly responsible for any of the workstreams. The two responsible for most workstreams have not worked on incentive program evaluation for a state before, from what I can tell.</li> </ul>
<b>Litigation</b>	I don't see where this is addressed
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Part of Phase 0 would also be prioritization of what programs to receive what level of evaluation.</li> <li>• Great that they included anticipated challenges and mitigation strategies upfront. The devil will be in the details, but it's good that they address it right away.</li> <li>• Good plan for collecting data.</li> <li>• I like that they describe clear indicators for benchmarking, but those indicators are not exactly aligned with the strategy. They reference alignment with the strategy earlier on in the section but don't seemed to have looked at it closely enough to match their proposed indicators to it. With their focus being on the state-to-state benchmarking—perhaps driven by their experience in private site selection—it gives me some concern that the focus on our economic development strategy will be tacked onto an existing methodology instead of the core focus of the project. The core outcome we are looking for is alignment with a strategy, not the best index for site selectors deciding which state to advise a business to make their investment. <ul style="list-style-type: none"> <li>◦ Similar misses later on with the KPI discussion.</li> </ul> </li> <li>• The flip side of the above is they do describe a good methodology for evaluating the firm-level incentive effectiveness, which is a positive.</li> <li>• Again, I think ChatGPT may have led them astray in a couple places. I'm not aware of current organizations named "Life Sciences Maine" or "Maine Wind Industry Initiative". This kind of stuff makes me wary of the quality of the final products they will produce.</li> <li>• Could have used some language on how they will gather survey responses. That is going to take some legwork.</li> </ul>
<b>Implementation – Work Plan</b>	<ul style="list-style-type: none"> <li>• Only covers the first 12 months, which is not exactly what was requested. They may have thought "first contract period" in the RFP meant only 12 months.</li> </ul>

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>Evaluator</b>	<b>Name</b>	Shae McGehee
	<b>Title</b>	Economic Development Incentives Manager
	<b>Department</b>	Economic and Community Development

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• Section 1 appears to be AI generated text, does not capture the intention of the statute <ul style="list-style-type: none"> <li>○ Pitching Dirigo as a solution rather than discussing the incentive evaluation</li> </ul> </li> <li>• Works primarily in FDI strategy</li> <li>• Current Maine project did not include analysis/evaluation of Maine's incentives, focused on investment attraction strategy</li> <li>• Site selection</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>• BT Strategies – policy intelligence</li> </ul>
<b>Organizational Chart</b>	Experience in public policy, limited quantitative training
<b>Litigation</b>	Not included
<b>Financial Viability</b>	Included
<b>Licensure/Certification</b>	Not included
<b>Certificate of Insurance</b>	Included



<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Limited methodology provided for incentive analysis</li> <li>• Lacking details for the approach to gathering survey responses as this would be a significant part of the project.</li> <li>• Text appears to be AI generated, listing organizations that don't exist or have not been active in years</li> <li>• Lacking an understanding of the RFP and the purpose of the statute.</li> </ul>
<b>Implementation – Work Plan</b>	This is a four year contract, proposal included work plan for one year and lacks detail, timeline in methodology references both completing work in 1 year and over the 4 year period

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
	<b>Title</b>	Small Business Development Manager
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<b>Applicant Name</b>	PFM Group Consulting LLC
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<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>Founded 1975  Owned by 47 managing directors  PFM Group Consulting, PFM Financial Advisors, PFM Swap Advisors, PFM Solutions</p> <p>Evaluations and analysis for state and local gov since 2016</p> <p>Worked with Oklahoma, NY, and Wisconsin. Incentive eval in Ohio and Vermont</p> <p>All State projects led by Director Randall Bauer. Bauer has been speaker at Federal Reserve Chicago among many others.</p>
<b>Subcontractors</b>	<p>Smart Incentives, Arlington VA. Launched 2013. Worked with Oregon (currently), New Jersey tax certification transfer program (2025), Wisconsin Economic Development Corp (2024).  Founded by Dr Ellen Harpel. Collaborated on major state work listed in overview of org. Testified to multiple state legislatures = Positive</p>
<b>Organizational Chart</b>	<p>Very Vertical org chart. Bauer under managing director. SMC Leads below. Then three more from PFM = Question (who do we connect with)</p>
<b>Litigation</b>	None
<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	<p>Not provided?  Contract Exceptions?!? Big Questions!!!</p>
<b>Certificate of Insurance</b>	Provided

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Task One -Mentions the Strategic Plan (positive)  Lots of info from Strategic plan, not expanded on (Negative)</p> <p>Lots of writing about making a plan. (Questionable)</p> <p>Data and info gathering – gain insight from leadership, incentive users.  Analysis – forecasting, trend analysis</p> <p>Mentions Draft report. Outlines what it could look like (positive)</p> <p>Quality Control – 100 evaluations = Interesting  Compare data to other states to ensure accuracy.  Internal review by senior members.</p> <p>Project Management</p>
<b>Implementation – Work Plan</b>	<p>Table is easy to view (good size and understandable) = Positive</p> <p>Some tasks broken down to individual person and other to “Project team” or “PFM Analyst.”</p> <p>Baurer only listed at beginning and End (Negative)  Who is point of contact for whole thing (Questionable) Baurer is (positive acknowledgement)</p>

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Seems weighted towards financial analysis as a firm, based on their overview. But some significant state incentive evaluation projects included.</li> <li>I appreciate the attempt to tie relevant project examples to the strategy themes.</li> <li>I like the consistency in having the same individuals who have done the incentive projects in other states, and they've been with the org for a while. Very strong tax incentive evaluation experience among the whole team. <ul style="list-style-type: none"> <li>Plus they are clear later on that these are the hands-on, day-to-day project people, not just general oversight who will pop in occasionally.</li> </ul> </li> <li>Impressive that the firm was hired for a similar project in Oklahoma and then rehired multiple times. Very similar arrangement to the Maine evaluation.</li> <li>Similar projects in NY and WI as well, although not quite as long-term as the OK project.</li> <li>I'll be curious to see how they address issues with participant data in the proposed services component, since that doesn't come through in their experience.</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>Familiar with Smart Incentives; that's a good partner. Not exactly clear what distinct role the sub will play. Sounds like another general member of the team.</li> <li>Would have liked to see them represented on the org chart.</li> </ul>
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>Chart is fine. I'd prefer to see named research assistants and analysts.</li> </ul>
<b>Litigation</b>	-
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	
<b>Certificate of Insurance</b>	

<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Decent understanding of Maine context. Clear grasp of some of the challenges one program had, although they didn't see all of the components of it. Still, a good discussion that shows how they think through incentive advantages and disadvantages.</li> <li>• Project management piece is straight and to the point; shows their experience doing these types of projects elsewhere.</li> <li>• I like that they identify specific comparable programs in other states they have evaluated previously and can reference.</li> <li>• Chamber relationship is smart for information gathering from participants.</li> <li>• Good discussion about data analysis.</li> <li>• If I had to find a fault with the proposed services, it might be that they could have been more specific about how they would measure programs against goals in the economic development strategy. They do discuss the strategy frequently and seem to understand that lens, but that extra step wasn't quite visible.</li> <li>• I think they left a couple references to the Wisconsin project, perhaps carried over from their bid on that project?</li> </ul>
<b>Implementation – Work Plan</b>	<ul style="list-style-type: none"> <li>• I'm not sure how well this was thought through. They limited the timeline to the end of the current FY, apparently due to the phrase in the RFP saying "first contract period", which is admittedly confusing. Still, even with that allowance, the timings are somewhat odd and should have been more fleshed out.</li> </ul>

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>• nation's leading independent financial advisor</li> <li>• very similar work with OK</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>• Smart Incentives, works on OK project as incentive reviewer, limited information regarding resume</li> </ul>
<b>Organizational Chart</b>	Limited info in chart, PFM Team described in overview, significant quantitative and policy skills
<b>Litigation</b>	Not in litigation
<b>Financial Viability</b>	Included
<b>Licensure/Certification</b>	N/a
<b>Certificate of Insurance</b>	Included, not project/client specific
	Proposed edits to contract, this does not happen at this juncture

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Demonstrated understanding of Maine and its demographics</li> <li>• Demonstrated understanding of incentives and how they can be evaluated, points out challenges of evaluating tax exemptions which will not be part of this RFP but was a substantial benefit for the PTDZ program <ul style="list-style-type: none"> <li>○ Understands the data they will need from the incentive programs</li> </ul> </li> <li>• Able to pull framework from previous work completed for incentives evaluations like OK</li> <li>• Connects previous work in other states to specific Maine program offerings</li> <li>• Mentions a steering committee, this is an interesting idea for the project and may help connect stakeholders with the research and recommendations</li> <li>• Research includes similar incentives in other states</li> <li>•</li> </ul>
<b>Implementation – Work Plan</b>	Work plan over first FY only

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<p>Established in 1989 by current chairperson of board. Done work with Indiana Economic Development Corp, Indiana State University, and Delaware River Climate Corp. Have done national work with USDOL, National Science Foundation Grants.</p> <p>Worked with NBRC before. Also New Hampshire Department of Business and Economic Affairs. Michigan Economic Development Corp = Positive</p> <p>Indicates three key implications Investment and workforce focuses incentives Shorter horizons/clearer ROI Greater accountability and transparency</p>
<b>Subcontractors</b>	None
<b>Organizational Chart</b>	Team of 7. Two strategic Advisors. Zachary Rice is lead (POC), 20 years of experience, Experience in Indiana with Quality of Life impact, impact analysis of data center, gap analysis.
<b>Litigation</b>	None in last five years
<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	None
<b>Certificate of Insurance</b>	Yes

<b>Evaluator</b>	<b>Name</b>	Jake Daniele
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<p>Provided high level work plan.</p> <p>Left notes in final document and spelling error for DECD (pg 4). <b>Negative</b></p> <p>Unique use of Design Spirit = Interesting</p> <p>Indicates knowledge of when reports are due = Positive</p> <p>Triangulate data with survey results and interview = interesting</p> <p>Benchmarking to gold standard models, which ones are gold standard? = Interesting</p>
<b>Implementation – Work Plan</b>	<p>Work plan outlines persons responsible as well as identifying which months it will be worked on. Broken down by task and specific deliverable = Positive</p>

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	Graph is small and a little hard to read = Questionable
	There is reporting sections but was not immediately clear how the rest of the requirements build into those reports

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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Good public evaluation experience in general, but only one project example that is fairly relevant. That project description, and the experience section overall, is lacking detail. That leaves me thinking they have not done this type of comprehensive incentive evaluation before.</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>None</li> </ul>
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>Chart is fine. I prefer to see specific analyst staff named.</li> <li>Staff resumes aren't really filling in gaps identified above. Seems like capable staff with good economic development experience, but little to no experience evaluating statutory incentive programs like this contract entails.</li> </ul>
<b>Litigation</b>	-
<b>Financial Viability</b>	-
<b>Licensure/Certification</b>	-
<b>Certificate of Insurance</b>	-



<b>Evaluator</b>	<b>Name</b>	Phoenix McLaughlin
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• They left some editing comments in the submitted file.</li> <li>• Thin. Little to comment on here. Seems like DECD would need to do a lot of the work to flesh out the project plan.</li> </ul>
<b>Implementation – Work Plan</b>	<ul style="list-style-type: none"> <li>• Fine.</li> </ul>

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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<b>File 2 – Organization Qualifications and Experience</b>
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	<b>Individual Notes</b>
<b>Overview of the Organization</b>	<ul style="list-style-type: none"> <li>Unclear of the skills the organization possesses to complete the work, further elaboration would be helpful</li> <li>Very short response, without a lot of detail</li> </ul>
<b>Subcontractors</b>	<ul style="list-style-type: none"> <li>None</li> </ul>
<b>Organizational Chart</b>	<ul style="list-style-type: none"> <li>Lacking experience in incentive evaluations</li> </ul>
<b>Litigation</b>	None
<b>Financial Viability</b>	Good
<b>Licensure/Certification</b>	None
<b>Certificate of Insurance</b>	Include

<b>Evaluator</b>	<b>Name</b>	Shae McGehee
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<b>File 3 – Proposed Services</b>
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	<b>Individual Notes</b>
<b>Proposed Services</b>	<ul style="list-style-type: none"> <li>• Little detail provided, not much to comment on</li> <li>• Did not demonstrate capabilities to complete the work involved in this RFP</li> </ul>
<b>Implementation – Work Plan</b>	Looks fine



STATE OF MAINE  
DEPARTMENT OF ECONOMIC AND  
COMMUNITY DEVELOPMENT

**MAINE.**  
ECONOMIC & COMMUNITY  
DEVELOPMENT

Janet T. Mills  
Governor

Michael A. Duguay  
Commissioner

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

I, Jake Daniele accept the offer to become a member of the Evaluation Team for this solicitation for the State of Maine Department of Economic and Community Development. 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 solicitation.

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 solicitation 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 this solicitation presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Jake Daniele

Jake Daniele (Oct 27, 2025 09:11:56 EDT)

Signature

Oct 27, 2025

Date



STATE OF MAINE  
DEPARTMENT OF ECONOMIC AND  
COMMUNITY DEVELOPMENT

**MAINE.**  
ECONOMIC & COMMUNITY  
DEVELOPMENT

Janet T. Mills  
Governor

Michael A. Duguay  
Commissioner

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

I, Shae McGehee accept the offer to become a member of the Evaluation Team for this solicitation for the State of Maine Department of Economic and Community Development. 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 solicitation.

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

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Shae McGehee  
Shae McGehee (Oct 27, 2025 09:14:45 EDT)

27/10/2025

**Signature**

**Date**



STATE OF MAINE  
DEPARTMENT OF ECONOMIC AND  
COMMUNITY DEVELOPMENT

**MAINE.**  
ECONOMIC & COMMUNITY  
DEVELOPMENT

Janet T. Mills  
Governor

Michael A. Duguay  
Commissioner

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP # 202508113**

**Comprehensive Evaluation of State Investments in Economic Development**

I, Phoenix McLaughlin accept the offer to become a member of the Evaluation Team for this solicitation for the State of Maine Department of Economic and Community Development. 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 solicitation.

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 solicitation 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 this solicitation presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

*Jean Phoenix McLaughlin*

Signature

Oct 27, 2025

Date