

State of Maine
Master Score Sheet

RFP# 202312242					
Statewide Office Supply – Office Supplies					
Bidder Name:		ODP	Staples	WB Mason	
Proposed Cost:		\$4,451,605.45	N/A*	\$3,595,289.92	
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	25	12	12	22	22
Section III: Proposed Services	25	10	13	22	22
Section IV: Cost Proposal	50	40.4	0	50	50
TOTAL	<u>100</u>	<u>62.4</u>	<u>25</u>	<u>94</u>	<u>94</u>

RFP# 202312242					
Statewide Office Supply – Paper					
Bidder Name:		ODP	Staples	WB Mason	
Proposed Cost:		\$3,474,503.59	N/A*	\$2,593,869.29	
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	25	12	12	22	22
Section III: Proposed Services	25	10	13	22	22
Section IV: Cost Proposal	50	37.3	0	50	50
TOTAL	<u>100</u>	<u>59.3</u>	<u>25</u>	<u>94</u>	<u>94</u>

RFP# 202312242				
Statewide Office Supply – Toner				
Bidder Name:		ODP	Staples	WB Mason
Proposed Cost:		\$4,802,995.05	N/A*	\$3,832,728.47
Scoring Sections	Points Available			
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	25	12	12	22
Section III: Proposed Services	25	10	13	22
Section IV: Cost Proposal	50	39.9	0	50
TOTAL	<u>100</u>	<u>61.9</u>	<u>25</u>	<u>94</u>

*Please refer to the Team Consensus Notes for more information.

Award Justification Statement
RFP# 202312242 – Statewide Office Supply
Program

I. Summary

Through the RFP Process, the Department of Administrative and Financial Services (DAFS) Division of Procurement Services (Procurement) sought proposals for three awards: Office Supplies, Paper, and Toner. All three contracts are conditionally awarded to WB Mason, who received the highest total score for all three awards.

II. Evaluation Process

An evaluation team comprised of State employees, applied the consensus method in evaluating the Bidders eligibility requirements, and scoring the Bidders Organizational Qualifications and Experience and Proposed Services. Scores for the Cost Proposal were assigned using a mathematical formula.

III. Qualifications & Experience

The awarded bidder, WB Mason, has extensive experience with the distribution of office supplies, paper, and toner within the state of Maine and all over New England.

IV. Proposed Services

WB Mason is able to provide the services as requested in the RFP. They provided a comprehensive response that demonstrated a clear understanding of the Scope of Services.

V. Cost Proposal

Office Supplies	\$	3,595,289.92
Paper	\$	2,593,869.29
Toner	\$	3,832,728.47

WB Mason's Proposed Costs for each category are shown in the table above. WB Mason proposed the lowest cost for each category.

VI. Conclusion

Out of 100 possible points, WB Mason received 94 points for all three awards, the highest point total awarded by the evaluation team.



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES**

**Janet T. Mills
Governor**

**Kirsten Figueroa
Commissioner**

5/7/2024

John McDonald, Branch Manager
W.B. Mason Co., Inc.
106 Pine Tree Industrial Parkway
Portland, ME, 04102

**SUBJECT: Notice of Conditional Contract Award under RFP # 202312242,
Statewide Office Supply Program**

Dear Mr. McDonald,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Statewide Office Supply Program. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

- W.B. Mason Co., Inc. (Office Supplies, Toner, Paper)

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

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

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

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

Sincerely,

DocuSigned by:
Brandon Martin

2F79272FCC37434...
Brandon Martin,
Acting Deputy Chief Procurement Officer
Division of Procurement Services

STATEMENT OF APPEAL RIGHTS

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



**STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
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Commissioner**

5/7/2024

Bill Rohs, Business Development Director
Staples Contract & Commercial LLC
500 Staples Drive
Framingham, MA 01702

**SUBJECT: Notice of Conditional Contract Award under RFP # 202312242,
Statewide Office Supply Program**

Dear Mr. Rohs,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Statewide Office Supply Program. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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**Kirsten Figueroa
Commissioner**

5/7/2024

Jenna Crouch, Business Development Manager
ODP Business Solutions, LLC
6600 N Military Trail
Boca Raton, FL 33496

**SUBJECT: Notice of Conditional Contract Award under RFP # 202312242,
Statewide Office Supply Program**

Dear Ms. Crouch,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Administrative and Financial Services for Statewide Office Supply Program. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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

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

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

Sincerely,

DocuSigned by:

Brandon Martin

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Brandon Martin,
Acting Deputy Chief Procurement Officer
Division of Procurement Services

STATEMENT OF APPEAL RIGHTS

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: ODP

DATE: 4/12/2024, 4/18/2024, 4/29/2024

SUMMARY PAGE

Department Name: Administrative and Financial Services

Name of RFP Coordinator: Skye Laidler

Names of Evaluators: Roberta DuPont, David Jackson Gregg Allen, Andrea Ray, Justin Franzose

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	12
Section III. Proposed Services	25	10
Section IV. Cost Proposal	50	
i. Office Supply Cost		40.4
ii. Paper Cost		37.3
iii. Toner Cost		39.9
<u>Total Points</u>		
i. <u>Office Supply</u>	<u>100</u>	<u>62.4</u>
ii. <u>Paper</u>	<u>100</u>	<u>59.3</u>
iii. <u>Toner</u>	<u>100</u>	<u>61.9</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: ODP

DATE: 4/12/2024, 4/18/2024, 4/29/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: ODP

DATE: 4/12/2024, 4/18/2024, 4/29/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	12

Evaluation Team Comments:

- I. Overview of the Organization
 - 37 years of experience
 - 25 US distribution centers
 - Based out of Florida
 - Closest distribution center is in Pennsylvania
 - Multiple carriers; own trucks, UPS, and third-party carriers

- II. Subcontractors
 - May subcontract without consent from the State
 - Include but are not limited to, third-party logistic vendors, delivery carriers, and customer services providers

- III. Organizational Chart
 - Inconsistencies with what positions were listed in the RFP itself
 - 6-8 people, unsure if enough to cover the State and UMS systems needs
 - Unsure if customer service able to support the needs of the State and UMS system

- IV. Litigation
 - Noted one litigation matter
 - Noted that it will not affect ODP's business solutions

- V. Financial Viability
 - Provided

- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: ODP

DATE: 4/12/2024, 4/18/2024, 4/29/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	25	10

Evaluation Team Comments:

I. Services to be Provided

A. Products

- Can offer office supplies, paper, and toner
- Vague descriptions of products
- Noted that some product types have restrictions

B. Statewide Distribution

- Proposed the state adopt two-day delivery
- Ability to deliver next day was vague/unclear
- Stated orders have to be submitted by 3:00 PM for next day delivery
- They don't identify what the 1–2-day delivery business zone is.
 - i. Would areas in Maine not qualify for the 1-2 business day?
- May increase cost for certain delivery methods/areas and/or regions
- Did include contingency plan

C. Placing Orders

- 24-7 website availability with live inventory
 - i. Know immediately what is in stock or not
- Did not address onboarding new users and timeline
- Real time authorization, no hold pending
- Did not address out of stock, substituting items
- Did not address ACH payments

D. Reporting

- Did not respond to quarterly meeting requirement
- Meet requirements for reporting and statistics

E. Corporate Commitment

- Met requirements for corporate commitment

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: ODP

DATE: 4/12/2024, 4/18/2024, 4/29/2024

F. Sustainability

- Provided information regarding the greener purchasing program
 - i. Rate and classify the products they sell in three categories

G. Customer Support

- Customer Care Desk- toll-free phone number, Monday-Friday 8:00AM-8:00 PM (EST)
- Specially trained people to support their clients
- One call resolution process- Customer Service staff empowered to resolve problems in one call
- Indicate adequate end user training online

H. Transition and Implementation Plan

- Transition and Implementation plan was provided, but delivery dates were not provided for when these would happen
 - i. Stated that they would meet the timeline, but didn't provide specific details (days, weeks, etc.) on how that timeframe would be met
- Implementation is relying on the State of Maine and UMS Systems to set the objectives

I. OPPORTUNITIES FOR MUNICIPALITIES, POLITICAL SUBDIVISIONS, AND SCHOOL DISTRICTS

- Noted that they will extend the contract to municipalities, political subdivisions, and school districts within the State of Maine and Cooperative agreements

J. Quality Assurance

- 12-month online ordering history can be reviewed at any time for Audit purposes
- Offer product samples at no cost

K. Administrative Fee

- Acknowledged the Administrative Fee

II. Video Demo

- Personalized to the specific RFP
- Well, Produced
- Appears to meet or exceed what the State would need

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: ODP

DATE: 4/12/2024, 4/18/2024, 4/29/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Office Supplies

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$3,595,289.92	,	\$4,451,605.45	x	50 points	=	40.4

Paper

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,593,869.29	,	\$3,474,503.59	x	50 points	=	37.3

Toner

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$3,832,728.47	,	\$4,802,995.05	x	50 points	=	39.9

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: Staples

DATE: 4/16/2024, 4/18/2024, 4/29/2024

SUMMARY PAGE

Department Name: Administrative and Financial Services

Name of RFP Coordinator: Skye Laidler

Names of Evaluators: Roberta DuPont, David Jackson Gregg Allen, Andrea Ray, Justin Franzose

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	12
Section III. Proposed Services	25	13
Section IV. Cost Proposal	50	
i. Office Supply Cost		0
ii. Paper Cost		0
iii. Toner Cost		0
<u>Total Points</u>		
i. Office Supply Cost	<u>100</u>	<u>25</u>
ii. Paper Cost	<u>100</u>	<u>25</u>
iii. Toner Cost	<u>100</u>	<u>25</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: Staples

DATE: 4/16/2024, 4/18/2024, 4/29/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: Staples

DATE: 4/16/2024, 4/18/2024, 4/29/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	12

Evaluation Team Comments:

- I. Overview of the Organization
 - Over 37 years of experience
 - Headquarters is in Massachusetts
 - Listed three other states as clients (Georgia, Nevada, Michigan)
- II. Subcontractors
 - Combination of own fleet, national carriers, and third-party carriers
 - UPS, local carriers, and couriers, but don't list the names of the carriers or couriers.
 - i. Don't consider as sub-contractors
- III. Organizational Chart
 - Provided
 - Didn't specifically identify how many staff would be available
- IV. Litigation
 - Did not list litigation
- V. Financial Viability
 - Not provided as requested
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: Staples

DATE: 4/16/2024, 4/18/2024, 4/29/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	25	13

Evaluation Team Comments:

I. Services to be Provided

A. Products

- Offer office supplies, paper, and toner
- Listed other products and services
- Provided Core List items
- Work with the State to outline core items that may have customizable icons that could contain the State's own message

B. Statewide Distribution

- Offered pick up in store- Place order and pick up at local Staples
 - i. Concerns about risk and cost of employee travel
- Stated they are committed to 99 percent of eligible items on the core list for Next Day Delivery
 - i. Question on lead time for items not included on the core list
 - ii. Question what eligible items means
- Nationally 97.6 percent for Next Day Delivery on all in stock items
- Identified primary courier would be Capstone Logistics
 - i. Question do they currently use this provider for courier services
- Fulfillment will be from Putnam, Connecticut
- Provided disaster recovery contingency plan

C. Placing Orders

- Item is discontinued, backordered or out of stock, customer service rep will notify the user and offer replacement,
 - i. Team had question on timeline for this
- Delivery Day Notification is available to view when to determine if item you are looking to purchase is eligible for Next Day Delivery
- Instant self-registration
- Multiple ordering options by phone, mobile ordering, website, electronic data interchange

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: Staples

DATE: 4/16/2024, 4/18/2024, 4/29/2024

- i. Stated the website is the most efficient

D. Reporting

- Met all requirements listed in the RFP
- Appears robust
- Can do reports on demand or predetermined intervals
- Customizable for whatever the States needs are
- Account management team would be available to meet regularly

E. Corporate Commitment

- Key Account Executive will support program needs
- Staff was identified
- Committed to excellent customer service

F. Sustainability

- 5-year plan for environmental improvements
- System on their site with search and filter capabilities to order eco-responsible products

G. Customer Support

- They state customer service representatives are available to resolve issues
 - i. Unclear how many representatives are available or when
- First call resolution process- 90% of issues is resolved on the first call

H. Transition and Implementation Plan

- Provided detailed implementation plan
- Implementation model could be completed within 30 days

I. OPPORTUNITIES FOR MUNICIPALITIES, POLITICAL SUBDIVISIONS, AND SCHOOL DISTRICTS

- Stated they are “Staples is willing to extend the products and services offered in the Request for Proposal to other State entities within the State of Maine should they wish to do business with us.”
- Team had concerns about the phrase of “State entities”, whether this includes municipalities and school districts

J. Quality Assurance

- Did not respond to the audit requirement of the RFP
- Do annual vendor reviews and continue to test their product
- Provide samples at no charge
- No hassle returns and free pick up

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: Staples

DATE: 4/16/2024, 4/18/2024, 4/29/2024

K. Administrative Fee

- Acknowledged and agreed to the fee requirement in the RFP

II. Video Demo

- Website was user friendly
- Site has customized account set up, workflow approvals, order tracking, administrative accounts are available and the ability to add new users
- Site meets or exceeds what the State would require

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: Staples

DATE: 4/16/2024, 4/18/2024, 4/29/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Office Supplies

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$3,595,289.92	,	0	x	50 points	=	0

Paper

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,593,869.29	,	0	x	50 points	=	0

Toner

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$3,832,728.47	,	0	x	50 points	=	0

Evaluation Team Comments:

Staples received a score of 0 on all three cost proposals submitted. Staples did not provide costs for all line items, or an equivalent substitute as requested in the RFP in Part IV, Section IV, 3, b, "Pricing must be provided for **all line items being proposed** on Appendix E. Bidders may not leave the pricing blank for any line item being proposed. An **equivalent substitute** of matching specifications and quality may be listed. Bidders are encouraged to list equivalent substitute items to the extent that the substitutions would be advantageous to the State of Maine (for example, substitutions with a lower price would be considered advantageous)."

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242**RFP TITLE:** Statewide Office Supply**BIDDER:** WB Mason**DATE:** 4/16/2024, 4/18/2024, 4/29/2024

SUMMARY PAGE

Department Name: Administrative and Financial Services**Name of RFP Coordinator:** Skye Laidler**Names of Evaluators:** Roberta DuPont, David Jackson Gregg Allen, Andrea Ray, Justin Franzose

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	22
Section III. Proposed Services	25	22
Section IV. Cost Proposal	50	
i. Office Supply Cost		50
ii. Paper Cost		50
iii. Toner Cost		50
<u>Total Points</u>		
i. Office Supply Cost	<u>100</u>	<u>94</u>
ii. Paper Cost	<u>100</u>	<u>94</u>
iii. Toner Cost	<u>100</u>	<u>94</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: WB Mason

DATE: 4/16/2024, 4/18/2024, 4/29/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: WB Mason

DATE: 4/16/2024, 4/18/2024, 4/29/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	22

Evaluation Team Comments:

- I. Overview of the Organization
 - Founded in 1897
 - Unclear how many years of modern office supply experience
 - Headquarters is located in Massachusetts
 - Two distribution centers in Maine
 - Do over \$600 million sales in office supply, paper and toner
 - Clients all New England States and New Jersey, Pennsylvania and Delaware
 - Incumbent
 - Fleet of over 1,000 leased vehicles in addition to their own vehicles
 - Over 60 distribution centers

- II. Subcontractors
 - Only subcontractor use is Commercial Delivery Systems
 - i. State that deliveries can be live tracked
 - ii. Use this for rural Maine deliveries
 - Did not list UPS as a subcontractor and UPS has been utilized in the past

- III. Organizational Chart
 - Provided
 - Indicated for State of Maine accounts
 - Named individuals and titles, titles were clear for what each role was
 - They did not provide job descriptions

- IV. Litigation
 - Provided past five years of closed case litigation
 - No current litigation

- V. Financial Viability
 - Provided Dun & Bradstreet report
 - Low to moderate financial risk

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: WB Mason

DATE: 4/16/2024, 4/18/2024, 4/29/2024

VI. Certificate of Insurances

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: WB Mason

DATE: 4/16/2024, 4/18/2024, 4/29/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	25	22

Evaluation Team Comments:

I. Services to be Provided

A. Products

- Offer office supplies, paper, and toner
- Offer multiple ways to restrict purchases
 - i. Can restrict to core or favorites, will implement any rules the State wants

B. Statewide Distribution

- Very unambiguous on next day delivery throughout the State of Maine
- Next business day delivery via 27 company owned vehicles, for orders received up to 6:00 pm
- Local service and fast delivery
- Warehouse staff 24 hours
 - i. Fulfill the orders on the second and third shift
- They have 2 warehouses in Maine
- Comprehensive disaster recovery/business continuity policy
 - i. Managed through 60 facilities through the U.S.
 - ii. 24-hour on-site monitoring

C. Placing Orders

- Accept credit card and ACH payments
- Take orders online, phone, email, US mail, through the account executive
- Robust and user-friendly
- Out of stock- Will notify and offer the same or better
- Maintain an inhouse staff of ecommerce support personnel who can register and setup new users within hours of receiving the request

D. Reporting

- Did not respond to quarterly meeting requirement
- Previously has fulfilled all reporting requirements
- Provided samples of reports

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: WB Mason

DATE: 4/16/2024, 4/18/2024, 4/29/2024

- i. Described in detail what the reports would include and what the reports could provide for information

E. Corporate Commitment

- Has support of the company's senior management
 - i. CEO and president
- Ownership group has been together since the early 1980's
- Committed to exceptional customer service and price matching

F. Sustainability

- Label products that contain recycled content
- Use 100 percent recycled copy paper
- Use fuel efficient vehicles
- Offer reusable totes for deliveries
- Support sustainability goals through a variety of practices

G. Customer Support

- 200 plus customer service representatives
- Current sales executives for the state of Maine have 26 years of service
- Personalized customer services support
 - i. Responds by phone call or email
- Responsive and customer focused
- Account executive and Portland manager are available by cell 24-7

H. Transition and Implementation Plan

- Incumbent no transition needed

I. OPPORTUNITIES FOR MUNICIPALITIES, POLITICAL SUBDIVISIONS, AND SCHOOL DISTRICTS

- Clearly outlined

J. Quality Assurance

- Internal audits at no additional costs
- Will provide product samples upon request
- Will do ad hoc reports upon request for audit purposes

K. Administrative Fee

- Noted and agreed to

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply

BIDDER: WB Mason

DATE: 4/16/2024, 4/18/2024, 4/29/2024

- II. Video Demo
 - Standard video of how to use the website
 - Big red check marks helpful

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312242**RFP TITLE:** Statewide Office Supply**BIDDER:** WB Mason**DATE:** 4/16/2024, 4/18/2024, 4/29/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Office Supplies

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$3,595,289.92	,	\$3,595,289.92	x	50 points	=	50

Paper

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,593,869.29	,	\$2,593,869.29	x	50 points	=	50

Toner

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$3,832,728.47	,	\$3,832,728.47	x	50 points	=	50

Evaluation Team Comments:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242
RFP TITLE: Statewide Office Supply Program
BIDDER NAME: ODP
DATE: April 11, 2024
EVALUATOR NAME: Gregg N. Allen
EVALUATOR DEPARTMENT: UMS

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

Individual Evaluator Comments:

II. Organization Qualifications and Experience

- 1. *Overview of Organization*
Appears to meet requirements.
- 2. *Subcontractors*
Uses third-party service (UPS & local couriers)
“May subcontract without written consent from the State”
- 3. *Organizational Chart*
Appears to meet requirements.
- 4. *Litigation*
One case provided.
- 5. *Financial Viability*
Not evaluated by me but information was provided.
- 6. *Certificate of Insurance*
Appears to meet requirements.

III. Proposed Services

- i. Services to be Provided:*
Fulfillment center in Newville, PA
No next day, desktop delivery (UMS requirement)

- b. Video Demo*
Appears to meet requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: 4/11/24

EVALUATOR NAME: Roberta DuPont

EVALUATOR DEPARTMENT: DAFS/Employee Health & Wellness

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

Individual Evaluator Comments:

II. Organization Qualifications and Experience

1. Overview of Organization

- Based out of Florida
- 25 US distribution centers with closest center is in PA
- +37 years of experience
- No minimum quantity
- Mobile App & tracking abilities

2. Subcontractors

- - Stated without written consent from the State, may subcontract duties
- - did not provide specific as requested in the RFP

3. Organizational Chart

- Provided org chart

4. Etc.

- No pending legal proceedings that would affect the requirements, however they outlined currently involved in one – contradicting

III. Proposed Services

a. Services to be Provided

A

- + Offer Office Supplies, Paper & Toner
- + product quality testing is required to be equal or better than national brands or equivalent

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: 4/11/24

EVALUATOR NAME: Roberta DuPont

EVALUATOR DEPARTMENT: DAFS/Employee Health & Wellness

- + dollar limits and product limitations may be set
 - Can create custom shopping lists
 - - some product types can have restrictions but not many – business machines, shredders ???
 - **B. 1.** - requesting to have the SOM accept 2-day delivery with cost savings. 1-day delivery required in RFP
 - **B. 2.** Have internal measurement tool Perfect Order Fulfillment (POF)
 - **C** 24/7 website availability with live inventory. Opportunity to discuss more options, for a fee?
 - **D** + Can provide quarterly annual reports with specific geographic information – did not respond to meeting requirement or providing reports in time frame outlined in the RFP
 - **E** - Did not provide overview of senior management in org chart section.
 - Can establish a core list of products to be “contract items” for a discounted price
 - **F** Have environmental strategies “GreenerOffice”
 - **G** Offer toll-free phone M-F 8am to 8pm EST, email and online chat
 - **H** Stated assigned implementation team to meet with SOM to develop the structure to meet the states needs. Did not provide timeline (hours, days, weeks), stated “will hit your date guaranteed”
 - **I** + able to support
 - **J. A.** +/- Agrees to provide the state the necessary information to verify contract compliance
 - **J. B.** + product samples will be offered at no cost
 - **K** Acknowledged
- b. *Video Demo*
- Clear and detailed video provided but a little long, over 30-mins

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: April 5, 2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

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

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Incorporated in 1986. 37 years of experience.*
- *ODP Business Solutions was formed by the merger of Office Depot and OfficeMax.*
- *Annual Sales of \$7.9 billion. Employs 20,000 associates. A Fortune 250 company.*

2. Subcontractors

- *Includes but is not limited to: third-party logistics vendors, delivery carriers, and customer service providers.*
- *Examples of subcontractors: Supplies Network for printer technician service, HP and Xerox for hardware, software providers, leasing partners.*
- *All subcontractors adhere to service level agreements (SLAs) to meet ODP’s standards, and vice versa.*

3. Organizational Chart

- *ODP’s Account Management Team consists of a sales and account management team and a support team that includes an implementation manager, implementation administrator, and Strategic Account Customer Care.*

4. Etc.

- *Financial Viability: includes a Dun & Bradstreet report. Company stock trades publicly on the NASDAQ (ODP).*
- *Includes certificate of liability insurance.*

II. Proposed Services

a. Services to be Provided

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: April 5, 2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

- i. Tech services: can develop a customized program based on our objectives. Also customized print services, managed print services to control print activity, space planning and more.*
- ii. Continuity of products: ODP purchases from reputable manufacturers. Product quality is required to be equal to or better than the national brand. ODP will not send substitutions without approval by the State.*
- iii. Product restrictions: ODP's ordering platform can be programmed to set dollar limits and product limitations. Users that order restricted items will receive a message to contact Purchasing to order the item. Alternatively, the State can allow designated approvers to have the authority to determine whether to override restrictions.*
- iv. ODP can systematically drive employees towards ordering core items. Capable of setting restrictions on product categories, applying pre-set budget functions, setting restrictions on dollar amounts of orders, subscriptions for automatic delivery, and more.*
- v. Online shopping tool: Can select a specific type of cart tool to support business needs. Carts will help with suggesting substitutions to get the lowest available price and with ordering green products.*
- vi. ODP's catalog has 8,233 SKU numbers.*
- vii. Statewide distribution: ODP's offer provides next-day delivery from their Newville, Pennsylvania distribution center and local cross docks. It is unclear if next-day delivery applies to 100% of all orders in general or just orders from Newville, PA. The response also says their standard lead times are 1-2 business days for stocked items, while orders outside the 1-2 day zone will take 2-7 days. Also says orders received by the cut off time of 3:00 EDT will be delivered within the next two business days between 8:30 a.m. and 5 p.m. local time, Monday through Friday. Their delivery network consists of their own trucks, UPS, and contracted third-party carriers.*
- viii. Delivery infrastructure and capability: During business reviews, ODP would report on key quality control metrics, such as fill rates, quality index, and on-time delivery.*
- ix. Placing orders: website with live inventory availability while ordering, available 24/7. Accepts credit cards.*
- x. Reporting: Can provide quarterly and/or annual reports on a variety of statistics to support business objectives.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: April 5, 2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

- xi. Corporate commitment: President of ODP will champion this commitment. State may audit ODP's books and records at its own expense no more than annually to determine whether ODP extended the correct pricing. ODP may dispute results of any audit and will refund any overages.*
 - xii. Sustainability: The Greener Purchasing Program is a useful set of tools to reduce State's environmental footprint.*
 - xiii. Customer support: Customer care desk available Monday through Friday, 8 AM-8 PM EDT. Also includes a primary point of contact and main account management contact.*
 - xiv. Transition and implementation plan: Implementation Team will meet with the State's key personal to develop the structure to ensure the program meets the State's needs. ODP will perform a program launch and marketing activities to introduce the new contract to end users, raise awareness of the new contract, and train end users via live training, user guides, Web site tutorials, Web conferencing, customer representatives, and more.*
 - xv. Municipalities, political subdivisions, and school districts: Will extend the contract to all of these entities and has demonstrated an ability to do so. For example, cooperative contracts under NASPO ValuePoint and OMNIA Partners.*
 - xvi. Quality Assurance: 12-month online ordering history can be reviewed at any time for audit purposes. Account manager will continually offer free product samples for evaluation, demonstrations, Lunch and Learns if required. Will pay the 1% administrative fee on gross sales quarterly.*
- b. Video Demo*
- i. Ordering/Web site demonstration: Based on the demonstration, this Web site appears to operate like any standard Web site for online ordering. The site appears to meet or exceed all the necessary capabilities the State would require. Certain aspects of the site are customizable. Users can control parameters such as product categories and budget allowances. Administrators/super users may control the bulletin board first shown upon login. Search bar. Predictive search elements. Sort functionality. Displays live inventory numbers. Can receive email confirmations after orders are placed. Delivery is typically next business day.*
 - ii. Order confirmation emails: include order details and expected delivery date.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: April 5, 2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

- iii. Order tracking: Can track packages via Veyer delivery tracker. Can sign up for email alerts.*
- iv. Optional: Online reporting dashboard, can report on a variety of statistics and key performance indicators. Data can be exported to Excel. Can add new users through the site and make them super users, who have the highest permissions in all categories.*
- v. A mobile ODP ordering app is available to place orders by phone.*
- vi. Can create approval workflow templates.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

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

Individual Evaluator Comments:

ORGANIZATION QUALIFICATIONS AND EXPERIENCE

1. OVERVIEW OF THE ORGANIZATION

Known and trusted national brand with limited retail locations in Maine – some closed since merger. Fortune 250 Company, \$7.9 billion annual sales, 20,000 employees. Lists State of Nebraska, State of Tennessee, and Philadelphia school districts as clients.

2. SUBCONTRACTORS

No list of subcontractors, but a declaration that they will hire who they want and then a few examples of larger suppliers like HP and Xerox that they say meet their standards.

3. ORGANIZATIONAL CHART

Org chart provided. Maine is tagged on the side of the org chart. A few personnel are identified who will be responsible for the Maine account.

4. LITIGATION

No list of litigation provided. Basically, they respond that they are a big business and are involved in typical litigation, but none of it would impact the performance of the contract. Did not answer the question. List one civil action in which they are plaintiff.

5. FINANCIAL VIABILITY

CONCERN: ODP did a re-org in 2020. Claim here sales in excess of \$8.9 billion, where above they claimed \$7.9 billion. D&B puts a Moderate to High Risk, and

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312242

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BIDDER NAME: ODP

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

indicates that exhibit financial difficulties, and may experience issues paying bills, which can interfere with acquisition of product and delivery by subcontractors.

6. CERTIFICATE OF INSURANCE

Insurance certificate provided \$1 million per incident, \$15 million aggregate, with \$5 million auto.

SCOPE OF SERVICES TO BE PROVIDED

A. PRODUCTS

Office Supplies, Paper, and Toner, plus a host of other products and services—like the print services available for delivery.

1. Quality name brands and private branded items are often OEM. Will not substitute without consent.
2. Offer a number of ways to limit or restrict purchase by client, budget, product.
3. Lots of features to promote “Core List” items including “Select” and “Green” options – quite a nice feature. Also, auto-pointing to state-preferred items.

B. STATEWIDE DISTRIBUTION

1. **Concern:** ODP does NOT accept Next-Day requirement and proposes alternative 2-day delivery – K would not be for Next-Day delivery! A proposed change in K terms changes the K. Talks about 2-day delivery a LOT! Fill rate 97.7, On time 99%, (but on what schedule?) Consolidated delivery option – but a separate negotiation! ALSO—Must order by 3pm for any chance of next-day!!!!
2. Contingency plan for disasters – does every winter Maine snow count? Talks global, but not specific.

C. PLACING ORDERS

Does not specifically answer the questions about on-boarding new users or timeline. Have online ordering. Accept credit card—real-time authorization, no hold pending card approval. Great tools for Green and Best Value products. Real-time inventory, so you

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

know immediately if an item is out of stock, which may explain why they do not respond to requirement for notification prior to substitutions.

D. REPORTING

1. ODP .can create whatever Quarterly/Annual reports the State wants.
2. They don't specifically respond to the meeting requirements.
 1. Usage reporting appears to be able to fulfill the State's requirements.
 2. Payment reports appear to be able to comport with requirements.

E. CORPORATE COMMITMENT

President and Executive VP David Centrella identified as point. Went off on a tangent about corporate philanthropy. Customer service identified as coming from Boca Raton, FL. Core list items become "contract items" and are discounted. ALLOWS audit no more than annually! Will refund overcharges and collect on undercharges discovered in audit!

F. SUSTAINABILITY

Has levels of green products so you can decide how much it's worth to save the planet. Generally expresses interest in increased green products.

G. CUSTOMER SUPPORT

Names Jenna Crouch as point of contact for the state contract and Maribeth Morel as the account management contact. Both are in the org chart. Has phone, email and live chat options for support. Talks about "One-Call Resolution" which would appear to be a HUGE plus, if first contact people are actually empowered to resolve issues – that's a customer service WIN, for sure. Open 8A-8P Eastern. Online ordering 24/7.

H. TRANSITION AND IMPLEMENTATION PLAN

CONCERN: Seems like they are ready to have a meeting once the contract is signed and determine what is needed then create and implement a plan. So, not a flip-a-switch thing, not a ready-to-go now thing. I get a "this is a process" vibe, and not a "we're ready to implement" vibe. It could be a while before people are up and running. Like, warehousing and logistics are on the checklist, but not "Hey, this is what we have in place ready to go."

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: ODP

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

I. OPPORTUNITIES FOR MUNICIPALITIES, POLITICAL SUBDIVISIONS, AND SCHOOL DISTRICTS

They do mention P-card capabilities here. Lots of talk about features they provide for municipalities, schools, etc. But they do not answer the question: Will you honor this K for all municipalities within the State? Will you honor it for schools? Why is it hard to answer that question?

J. QUALITY ASSURANCE

1. ODP agrees to provide info to verify K compliance. Nice 12-month order history feature – can it go back further if the K is extended?
2. Will offer free samples as required.

K. ADMINISTRATIVE FEE

ODP acknowledges the fee, which is not the same as agreeing to it. Will discuss any compliance issue that arises. (Clearly written by a lawyer).

VIDEO DEMO

I would not say the video is brief, but it is actually very good, with good production values. The personalization is a nice touch.

I really like the tabs for “Go Green” and to save money.

I like the additional email notification.

Mostly similar features to other web stores.

Interesting that the video says the delivery date is generally the next day, but that was not what they were saying in the proposal.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242
RFP TITLE: Statewide Office Supply Program
BIDDER NAME: ODP
DATE: 4/8/2024
EVALUATOR NAME: Andrea Ray
EVALUATOR DEPARTMENT: DHHS

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

*** Individual Evaluator Comments:**

II. Organization Qualifications and Experience

1. Overview of Organization

- *Offers products needed*
- *Experience of 37 years*
- *Qualifications – good*

2. Subcontractors

- *Uses subcontractors for delivery*
-
-

3. Organizational Chart – straight forward

4. Etc.

III. Proposed Services

a. Services to be Provided

- i. 2+ day delivery service (asked for leniency in the proposal) for cost savings? 2-7 day delivery on some items?*
- ii. Customer service – good – customer cut off time?*
- iii. Website seems easy to use*

b. Video Demo

- i. Video specific to RFP*
- ii. Items on web demo stated out of stock for standard items (Normal?)*
- iii. Web site easy to use*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242
RFP TITLE: Statewide Office Supply Program
BIDDER NAME: Staples
DATE: April 11, 2024
EVALUATOR NAME: Gregg N. Allen
EVALUATOR DEPARTMENT: UMS

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

Individual Evaluator Comments:

II. Organization Qualifications and Experience

- 1. *Overview of Organization*
Appears to meet requirements.
- 2. *Subcontractors*
Uses third-party services (UPS & local couriers)
- 3. *Organizational Chart*
Appears to meet requirements.
- 4. *Litigation*
No details provided.
- 5. *Financial Viability*
Not evaluated by me but information was provided.
- 6. *Certificate of Insurance*
Appears to meet requirements.

III. Proposed Services

- i. Services to be Provided:*
Fulfillment center in Putnam, CT
No next day, desktop delivery (UMS requirement)
“Focus on consolidated deliveries.”

- b. Video Demo*
Appears to meet requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: 4/11/24

EVALUATOR NAME: Roberta DuPont

EVALUATOR DEPARTMENT: DAFS/Employee Health & Wellness

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

Individual Evaluator Comments:

II. Organization Qualifications and Experience

1. Overview of Organization

- 37+ years of exsperiance
- Headquarters in Massachusetts
- Next business day deliveries on qualified orders
- Employee purchase program?
- Mobile app, online and nationwide stores

2. Subcontractors

- Uses third-part vendors to perform some services, like UPS or local couriers to make deliveries, but do not consider them subcontractors

3. Organizational Chart

- Provided. Descriptions were brief on members outlined

4. Etc.

- Do not believe any litigation will have a materially adverse impact on ability to provide services to the state

III. Proposed Services

a. Services to be Provided

A

- + Offer office Supplies, paper and toner
- Inventory driven by the level of high demand and unique needs of the customer
- +/- If an item is discontinued CSR will notify the user and offer a replacement (timeline of this not indicated)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: 4/11/24

EVALUATOR NAME: Roberta DuPont

EVALUATOR DEPARTMENT: DAFS/Employee Health & Wellness

- Offer flexible administrative controls, approval process, saving alternative and item blocking
- Will work with the state to create a core item list with a customizable icon that can contain the state own message
- **B. 1.** + committed to deliver 99% of eligible items on the states core list as next business day delivery
- **B. 2.** Have detailed emergency response plan
- **C** Have multiple ordering options, stated website is most efficient, order tracking, delivery notifications and free returns
- **D. 1.** On-demand access to detailed reports. Ad hoc or customized reports require a minimum of 2-5 business days
- **D. 2.** Account Management team will meet regularly
- **E** Senior Management support outlined
- **F** Have a sustainability policy with a 5-year plan in effect
- **G** CSR have authority to resolve issues.
- **H** After contract finalize, clear implantation plan outlined that could be completed within 30-days
- **I** Willing to extend services offered in the RFP to other state entities with the State of Maine, should they wish to do business with us
- **J. A.** Did not answer
- **J. B.** Can provide samples at no additional cost
- **K** Acknowledged and agreed

b. Video Demo

- i. Clear and detailed video provided*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: 4/8/2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

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

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Has been in the business of workspace products and solutions for 37 years.*
- *Headquartered in Boston, MA. Wholly owned by Staples, Inc. Operates in North America through e-commerce and direct sales.*
- *Staples Business Advantage is to meet the needs of enterprise customers via a private Web site and account experts. Staples.com is for the public.*

2. Subcontractors

- *Distribution: Uses a combination of its own fleet, national delivery services such as UPS, Staples-exclusive carriers, and third-party couriers for delivery. Does not consider these to be subcontractors.*
- *Does not say that any other subcontractors are used for anything else.*

3. Organizational Chart

- *Account management team: Includes business development, account management, and support teams. Purchasers will have live representatives available to assist with day-to-day needs.*

II. Proposed Services

a. Services to be Provided

- i. Continuity of products: Uses inventory models to ensure that items are stocked in the right fulfillment centers in the right quantities. Customer service representatives will assist with replacements for discontinued items, which will be comparable in form and function. Site is refreshed daily to reflect the latest selections.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: 4/8/2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

- ii. *Product restrictions: Offers flexible administrative controls, such as an approval workflow, alternative product suggestions to save money, and will block items in certain categories. Blocked items will explain to users what steps to take to order said items.*
 - iii. *Mechanisms to promote core list items: Offers more than 400,000 items. Will work with the state to create a core item list that achieves the State's objectives at competitive prices.*
 - iv. *Statewide distribution: Will commit to filling at least 99% of the eligible items on the State's core list by next business day. State will be supported by their fulfillment center in Putnam, CT.*
 - v. *Delivery infrastructure and capability: All fulfillment centers have an emergency response plan. Corporate offices have a business continuity plan should a force majeure event or disaster occur either at a Staples location or at a State location. Does disaster recovery plan testing, did an IT test recently on February 26, 2023.*
 - vi. *Placing orders: Will accept orders by phone, email, mobile app, Web site, and more. Accepts credit cards. Offers customizable controls to restrict products and spending. Will send a communication with a link that can be disseminated to all purchasers to allow them to instantly create an account and begin ordering.*
 - vii. *Reporting: On-demand access to detailed reports of user-level transactions. Reports are available in a variety of methods and formats. Can report on demand or at predetermined intervals. Two to five days to provide ad-hoc reports.*
 - viii. *Corporate commitment: Key Account Executive will support program needs.*
 - ix. *Sustainability: Has a five-year plan for environmental improvements. Has a system on its site with search and filter capabilities to order eco-responsible products.*
 - x. *Customer support: Customer service representatives are available to resolve issues. Nearly 90% of issues are resolved on the first call. Escalation rules and procedures are also in place.*
 - xi. *Transition and implementation plan: Has a detailed implementation model that can be completed within 30 days.*
 - xii. *Quality assurance: Has a quality assurance program and will ship samples upon request.*
- b. *Video Demo*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: 4/8/2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

- i. Provided an ordering site demo. Site has customized account setup. Workflow approvals. Order tracking. Administrative accounts available with additional permissions, ability to add new users. Can generate reports, set budgets, contact customer service.*
- ii. Mobile app available for ordering.*
- iii. Overall, the site operates like any standard ordering site and meets or exceeds what the State would require.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

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

Individual Evaluator Comments:

ORGANIZATION QUALIFICATIONS AND EXPERIENCE

1. OVERVIEW OF THE ORGANIZATION

National Corporation based in Massachusetts 1for 37 years with multiple retail outlets in Maine. Lists Georgia, Nevada, and Michigan as state clients.

2. SUBCONTRACTORS

Staples uses UPS and local couriers to make deliveries but does not consider them subcontractors.

3. ORGANIZATIONAL CHART

Org chart provided, with individuals with account responsibility named and their responsibilities identified. Org chart does not include the program.

4. LITIGATION

Litigation not listed. Rather, a general statement that businesses get sued and they don’t think any litigation will have an impact and they can’t discuss it because of confidentiality agreements they likely wrote. Nice one.

5. FINANCIAL VIABILITY

Did not provide a copy of the Dun & Bradstreet Report Snapshot. They said we could look it up on our account. Bold, but not in a good way.

6. CERTIFICATE OF INSURANCE

Insurance certificate provided. \$1.9 million per incident, \$10 million aggregate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

SCOPE OF SERVICES TO BE PROVIDED

A. PRODUCTS

Office Supplies, Paper, Toner, plus assorted other items like packing and shipping supplies, break room offerings, business furniture, printing.

1. Uses sophisticated inventory models to ensure stock. 97.6% fulfillment from intended fulfillment center. Replacement items comparable, often better than discontinued items.
2. Approval structure/Offer savings alternatives/Can block items.
3. Over 400,000 items. Can create “Core List” items with icon for state and promote those items or flag “preferred” “Core” or “Best buy” items.

B. STATEWIDE DISTRIBUTION

1. The industry leader – Lean Six Sigma—99% next-day delivery. Recently increased sq. footage in fulfillment centers. Next-day rate 97.6%. Staples fleet, national delivery services, and 3rd-party couriers (Capstone Logistics). Fulfillment from Putnam, CT.
2. Emergency Response Plan and auto-transfer to nearest fulfillment center. Back-up power. 2 maine centers, one for work, 2nd for disasters.

C. PLACING ORDERS

Web, phone, email, app, EDI, and 3rd-party. Comprehensive, user-friendly online ordering system – take CC and ACH, Notify immediately for out of stock, Customer Service will PROACTIVELY call you!

INSTANT SELF-REGISTERING!!!! Staples Implementation Team steps in if complex!

D. REPORTING

1. Lots of reports in every flavor imaginable.
2. State reports are customized by the Account Management Team for whatever the State needs.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

1. Staples appears to meet all order reporting requirements.
2. Staples appears to meet all payment reporting requirements.

E. CORPORATE COMMITMENT

Key Account Executive is Antonio Farinha and Area Vice President Deana Alegre handles escalations. Alegre is a senior-level manager and committed to exceptional customer service.

F. SUSTAINABILITY

Staples has an articulated Sustainability Policy and a Five-Year Plan to reduce environmental impacts. Can search eco-responsible products and they tag with icons.

G. CUSTOMER SUPPORT

Implemented a “First-call resolution process” and that is great. Empowering CSR to help customers makes a huge difference. 90% of calls resolved first level, with constant feedback including customer satisfaction surveys after working with CSR.

H. TRANSITION AND IMPLEMENTATION PLAN

Can implement seamless implementation. K, timeline, Training and demos, Go Live, support. As few as 30 days.

I. OPPORTUNITIES FOR MUNICIPALITIES, POLITICAL SUBDIVISIONS, AND SCHOOL DISTRICTS

Will extend the K to other state entities in Maine.

J. QUALITY ASSURANCE

Committed to QA. Annual vendor reviews. 1.2% product return rate. They continually test their products.
No-hassle returns – free pick up.

1. Does not respond to audit question.
2. Staples will provide samples at no charge.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: Staples

DATE: April 10, 2024

EVALUATOR NAME: DAVID JACKSON

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

K. ADMINISTRATIVE FEE

Staples acknowledges and agrees.

VIDEO DEMO

Lots of great videos available.

Lots of features discussed in videos.

Training is really accessible and re-training would also be – not a one-and-done.

Really like the “Cancel the order within 30 minutes” feature.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242
RFP TITLE: Statewide Office Supply Program
BIDDER NAME: Staples
DATE: 4/5/2024
EVALUATOR NAME: Andrea Ray
EVALUATOR DEPARTMENT: DHHS

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

Individual Evaluator Comments:

- II. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Experience - good*
 - *Qualifications - good*
 - *years of experience - good*
 - 2. *Subcontractors*
 - *Uses UPS or other delivery services*
 -
 -
 - 3. *Organizational Chart standard*
 - 4. *Etc.*

- III. *Proposed Services*
 - a. *Services to be Provided*
 - i. *Not next day delivery guarantees*
 - ii. *Pick up services at store?*
 - iii.
 - b. *Video Demo*
 - i. *Fair-not personalized for the RFP*
 - ii. *Site seems easy to use*
 - iii. *Able to change items easily*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: April 11, 2024

EVALUATOR NAME: Gregg N. Allen

EVALUATOR DEPARTMENT: UMS

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

Individual Evaluator Comments:

II. Organization Qualifications and Experience

- 1. *Overview of Organization*
Appears to meet requirements.
- 2. *Subcontractors*
Limited use of subs (CDS for some deliveries).
- 3. *Organizational Chart*
Appears to meet requirements.
- 4. *Litigation*
Comprehensive list
- 5. *Financial Viability*
Not evaluated by me but information was provided.
- 6. *Certificate of Insurance*
Appears to meet requirements.

III. Proposed Services

- i. Services to be Provided:*
Local service facilities in Maine
Next day, desktop delivery (UMS requirement)
- b. Video Demo*
Appears to meet requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: 4/12/24

EVALUATOR NAME: Roberta DuPont

EVALUATOR DEPARTMENT: DAFS/Employee Health & Wellness

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

Individual Evaluator Comments:

II. Organization Qualifications and Experience

1. Overview of Organization

- Current supplier for the State of Maine
- Based out of Massachusetts, with two distribution centers in Maine, South Portland and Bangor
- Company founded in 1897
- Have over 60 distribution centers and leases over 1000 delivery trucks

2. Subcontractors

- Bangor based courier service specific for the State of Maine for more remote regions

3. Organizational Chart

- Provided a clear org chart specific to the State of Maine outlining an locally based customer service rep

4. Etc.

- Provided past 5 years of closed cases for Litigation

III. Proposed Services

a. Services to be Provided

A

- + Provide office supplies, paper and toner
- Have a “BuyRight” program
- + Able to enact and maintain any type of product restrictions
- + Able to promote “Core List” items
- **B. 1.** + Able to provide next day delivery services throughout Maine

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: 4/12/24

EVALUATOR NAME: Roberta DuPont

EVALUATOR DEPARTMENT: DAFS/Employee Health & Wellness

- **B. 2.** Have a Disaster Recovery/Business Continuity Policy
 - **C** Maintains an in-house staff of E-Commerce support. Accepts credit card and ACH payment methods
 - **D. 1.** Responded with detail on reporting and provided examples.
 - **D. 2.** Did not respond to quarterly meeting requirement
 - **E** Ownership group in place since 1980. Opened numerous local service facilities within the State of Maine
 - **F** Label products that contain recycled content. 100% recycled copy paper. Use fuel efficient vehicles
 - **G +** Will provide a dedicated and locally based sales and customer support team for the state
 - **H** Current vendor, no implementation plan
 - **I** Able to extend services to municipal entities of the State of Maine
 - **J. A.** Internal audits at no additional cost
 - **J. B.** Will provide product samples upon request
 - **K** Agreed to quality assurance (1% admin fee)
- b. Video Demo*
- Clear easy to follow demo, order information is stored for multiple years

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: 4/8/2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

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

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Company was founded in 1897. Has over 60 distribution centers and leases over 1,000 delivery trucks servicing more than 300,000 businesses in the USA.*
- *Contract provider to multiple states in New England and several other Northeast states.*
- *Has two locations in Maine, located in South Portland and Bangor.*

2. Subcontractors

- *Only subcontractor used is Commercial Delivery Systems, who delivers in more rural parts of the state.*

3. Organizational Chart

- *Included a chart from the CEO to the local customer service representative.*

4. Etc.

- *Included Dun & Bradstreet report, certificate of liability insurance.*

II. Proposed Services

a. Services to be Provided

- i. Continuity of products: Partners with established and trusted manufacturers. Will notify the State of any discontinued products and offer equal or greater replacement products.*
- ii. Restrictions: Has capability to restrict items on its site as requested by the State.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: 4/8/2024

EVALUATOR NAME: Justin Franzose

EVALUATOR DEPARTMENT: Department of Administrative and Financial Services

- iii. Core list items: Will promote ordering of these by restricting the product selection to core items only. Site will include a red checkmark next to core items. Will block items outside the core list.*
 - iv. Statewide distribution: Next business day delivery is available via 27 company-owned vehicles. Orders placed by 6 PM will be delivered the next business day. Deliveries can be from South Portland, Bangor, or several other Northeast locations.*
 - v. Delivery infrastructure and capability: Has a detailed Disaster Recovery/Business Continuity Policy.*
 - vi. Placing orders: Orders may be placed through the site or the other usual ordering methods. Will accept procurement card and ACH.*
 - vii. Reporting: Will provide quarterly reports and included samples.*
 - viii. Corporate commitment: Has support of the company's senior management.*
 - ix. Sustainability: Supports sustainability goals through a variety of practices. Offers a variety of recycled and green products. Uses E-GEN fuel efficient vans. Offers reusable totes for deliveries.*
 - x. Customer support: Locally based customer support in South Portland, including an account executive, customer service representative, and customer service team of four, who would be fully versed in the master agreement details.*
 - xi. Transition and implementation plan: W.B. Mason is currently the designated supplier for the master agreement for the office supply program, so its program is already in place. They would activate their new pricing upon execution of a new master agreement.*
 - xii. Quality assurance: Is willing to do ad-hoc reports upon request for audit purposes. Will provide product samples. Will do customized reports in any format.*
- b. Video Demo*
- i. Site includes: My lists: most frequently purchased items. Category filters to refine search. Search ability. Can select cost codes and ledger codes. Dashboard to track orders. A return center.*
 - ii. Overall, operates like any standard site for online ordering and meets or exceeds requirements.*
 - iii. Contact information for local points of contact and customer service are available on the site.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: April 11, 2024

EVALUATOR NAME: David Jackson

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

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

Individual Evaluator Comments:

ORGANIZATION QUALIFICATIONS AND EXPERIENCE

1. OVERVIEW OF THE ORGANIZATION

WBMason is a Massachusetts-based company founded in 1897 with over \$600 million in annual sales of Office Supplies, Paper and Toner. It has over 60 distribution centers and multiple physical locations in Maine, including distribution centers in South Portland and Bangor. It has a fleet of over 1000 leased Ryder vehicles. It counts the NE states of Maine, Massachusetts, New Hampshire, Connecticut, and Rhode Island as clients, as well as NJ, Pennsylvania, and Delaware. Plus lots of universities. Clients: UMaine, Rhode Island, Maine Health.

2. SUBCONTRACTORS

CDS of Bangor for rural Maine deliveries. Deliveries can be live tracked.

3. ORGANIZATIONAL CHART

Organizational chart “For the State of Maine” account, with individuals named. Clear from the titles what their responsibilities are.

4. LITIGATION

Responsive. They actually provided a list of litigation. Interesting reading.

5. FINANCIAL VIABILITY

Provided D&B report. Low to moderate financial risk.

6. CERTIFICATE OF INSURANCE

Certificate of insurance provided.\$1 million/\$2 mil agg. \$22 mil umbrella

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: April 11, 2024

EVALUATOR NAME: David Jackson

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

SCOPE OF SERVICES TO BE PROVIDED

A. PRODUCTS

Office products, Paper, Toner

1. Offer national brands and branded items. If a product is discontinued a replacement of equal or greater quality is offered at equal or lesser price.
2. Offers multiple ways to restrict purchases, even limiting visibility of products.
3. Can restrict to Core items or Favorites lists. Core items have big red checkmarks. Will implement any rules Maine wants.

B. STATEWIDE DISTRIBUTION

1. Provide next-business-day delivery throughout Maine on 27 company-owned vehicles from 2 distribution centers in So. Portland and Bangor. Sales and Cust. Service based in Portland. Has distribution available in MA, NH, NY, and NJ. Warehouses are staffed 24 hours and orders are processed 2nd and 3rd shifts. If order is place before 6pm it will be delivered Next Business Day! WB Mason has 2 warehouse facilities in Maine.
2. Disaster Recovery through 60 facilities in US. Multiple redundancies.

C. PLACING ORDERS

In-house staff register new users. Online, phone, email, US Mail, and through the Acct Exec. Accepts CC and ACH payments. Out of stock, will notify and offer same or better quality at same or lower cost.

D. REPORTING

1. Meets reporting request.
2. Did not mention meetings. Provided sample electronic copies of reports quarterly meetings.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242

RFP TITLE: Statewide Office Supply Program

BIDDER NAME: WB Mason

DATE: April 11, 2024

EVALUATOR NAME: David Jackson

EVALUATOR DEPARTMENT: BOE, an affiliated board with PFR

E. CORPORATE COMMITMENT

Leo Meehan III, CEO and John Greene, President, support the program. Committed to exceptional customer and commit to price matching.

F. SUSTAINABILITY

Identifies all products that are green, sustainable, non-toxic, USGBC certified, etc. Company is committed to sustainable practices and is incorporating electric vehicles in their delivery fleet. They also deliver in reusable totes where feasible.

G. CUSTOMER SUPPORT

Amanda Drummond is Acct Exec and Heather Simard is CSR for Maine. 200+ client support specialist provide support. Four locally-based CSR in Maine avail 7:30a-6p. Amanda and John McDonald, Portland Branch Mgr, are available by cell 24/7.

H. TRANSITION AND IMPLEMENTATION PLAN

Current contract – no transition

I. OPPORTUNITIES FOR MUNICIPALITIES, POLITICAL SUBDIVISIONS, AND SCHOOL DISTRICTS

WBMason will extend to municipalities and schools.

J. QUALITY ASSURANCE

Happy to conduct internal audits at no cost to Maine.

1. Happy to conduct internal audits at no cost to Maine.
2. Will provide product samples to Purchasing upon request.

K. ADMINISTRATIVE FEE

Noted and agreed.

VIDEO DEMO

Video fine – big red checkmarks helpful.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312242
RFP TITLE: Statewide Office Supply Program
BIDDER NAME: WB Mason
DATE: 4/8/2024
EVALUATOR NAME: Andrea Ray
EVALUATOR DEPARTMENT: DHHS

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

Individual Evaluator Comments:

- II. *Organization Qualifications and Experience*
 - 1. *Overview of Organization*
 - *Current vendor for SOM - excellent*
 - *Long time experience - excellent*
 - *200+CSR & 26yr combined service for sales representatives*
 - 2. *Subcontractors*
 - *None listed however occasionally use UPS to deliver on rare occasions.*
 -
 -
 - 3. *Organizational Chart – standard*
 - 4. *Etc.*

- III. *Proposed Services*
 - a. *Services to be Provided.*
 - i. *Local service*
 - ii. *Next day delivery*
 - iii. *Sustainable products/Green Trucks*
 - iv. *Excellent CS*
 - b. *Video Demo*
 - i. *General video not personalized for RFP*
 - ii. *Site easy to use*
 - iii. *Able to change items easily*



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312242
RFP TITLE: Statewide Office Supply Program

Gregg Allen

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

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

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

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

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

DocuSigned by:

Gregg Allen

47C1E54E3AE24D1

4/2/2024

Signature

Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312242
RFP TITLE: Statewide Office Supply Program

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

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

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

DocuSigned by:

Roberta DuPont

317439DE3026432...

Signature

4/3/2024

Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312242
RFP TITLE: Statewide Office Supply Program

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

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

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

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

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

DocuSigned by:
Justin Franzose
AEED007B9A8044E...
Signature

4/2/2024

Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312242
RFP TITLE: Statewide Office Supply Program

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

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

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

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

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

DocuSigned by:
David Jackson
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Signature

4/2/2024
Date



STATE OF MAINE
DEPARTMENT OF ADMINISTRATIVE
AND FINANCIAL SERVICES

Janet T. Mills
Governor

Kirsten Figueroa
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312242
RFP TITLE: Statewide Office Supply Program

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

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

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

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

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

DocuSigned by:
Andrea Ray
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Signature

4/2/2024
Date