**STATE OF MAINE**

**Department of Economic & Community Development**

*Office of Business Development*



**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

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| --- | --- |
| **RFP Coordinator** | *All communication regarding the RFP must be made through the RFP Coordinator identified below*.**Name:** Charlotte Mace **Title:** Director, Office of Business Development**Contact Information:** charlotte.mace@maine.gov |
| **Submitted Questions Due** | *All questions must be received by the RFP Coordinator identified above by:***Date:** March 22, 2024 no later than 11:59 p.m., local time |
| **Proposal Submission Deadline** | *Proposals must be received by the Division of Procurement Services by:***Submission Deadline:** April 12, 2024 no later than 11:59 p.m., local time.*Proposals must be submitted electronically to:* Proposals@maine.gov |

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PUBLIC NOTICE

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**State of Maine**

**Department of Economic & Community Development**

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

The State of Maine is seeking proposals for a qualified professional firm to gather data on the investment attraction/site selection leads that have been received by the Office of Business Development (OBD) over the past several years, assess how well these leads align with the State of Maine’s economic development priorities, determine why some leads did not result in investment, and develop recommendations to ensure that future lead generation and OBD response and tools align with State of Maine economic development priorities and maximize conversion/success rate.

A copy of the RFP, as well as the Question & Answer Summary and all amendments related to the RFP, can be obtained at: <https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps>

Proposals must be submitted to the State of Maine Division of Procurement Services, via e-mail, at: Proposals@maine.gov. Proposal submissions must be received no later than 11:59 p.m., local time, on April 12, 2024. Proposals will be opened the following business day. Proposals not submitted to the Division of Procurement Services’ aforementioned e-mail address by the aforementioned deadline will not be considered for contract award.

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**RFP TERMS/ACRONYMS with DEFINITIONS**

The following terms and acronyms, as referenced in the RFP, shall have the meanings indicated below:

|  |  |
| --- | --- |
| **Term/Acronym** | **Definition** |
| **Department** | Department of Economic and Community Development |
| **OBD** | Office of Business Development |
| **RFP** | Request for Proposal |
| **SMS** | Select Maine Sites |
| **State** | State of Maine |

**State of Maine - Department of Economic & Community Development**

*Office of Business Development*

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

**PART I INTRODUCTION**

1. **Purpose and Background**

The Department of Economic & Community Development (Department) is seeking professional consulting services as defined in this Request for Proposal (RFP) document. This document provides instructions for submitting proposals, the procedure, and criteria by which the awarded Bidder will be selected, and the contractual terms which will govern the relationship between the State of Maine (State) and the awarded Bidder.

The Office of Business Development (OBD) is required by statute to emphasize a program of targeted business development designed to attract businesses in promising, growth industries that may be a potential economic fit for Maine and businesses that are considered to be compatible with Maine's environment and interests. OBD is required to actively seek and encourage firms to expand or locate in Maine.

OBD’s investment attraction goals and current efforts are strongly guided by the State of Maine’s economic development priorities as defined by Maine’s 10-Year Economic Development Strategy.

Over the past several years OBD has been active in generating “leads” that could result in new private investment in the State of Maine or new investment in existing Maine businesses (expansions). Some of these leads come into OBD’s pipeline via a wide variety of sources, including (but not limited to): OBD website/answering service, OBD site selection tool (selectmainesites.com), industry conferences, and partner organizations. When these leads arrive, OBD “reacts” to them, making them “reactive” leads. Other leads OBD generates on its own by pursuing companies or investors who are targeted based on their potential alignment with Maine’s communities, environment, and/or economic development priorities. These are “proactive leads.” In both cases, OBD follows up on leads, assembles information and incentives to share with potential investors, and endeavors to transform these leads into real opportunities that will eventually become new investments. Overall, due to existing staffing constraints and the high volume of leads that OBD manages, the ratio of reactive to proactive leads is approximately 4:1.

OBD has received feedback from investors, national site selectors, and companies that our level of responsiveness, “client management” skills, and ability to quickly bring Maine’s top government leaders/permitting agencies to the table is of extremely high quality. However, the number of leads that become quality opportunities (opportunities where the investor is conducting a business case or assembling financing or investigating permitting pathways) remains low, and the number of quality opportunities that become investments is even lower.

As described in Part II below, this study will aim to assess this existing lead generation and response process, determine alignment of the leads to Maine’s economic development priorities, and develop strategies to increase the quality of the leads and to increase OBD’s ability to better define why potential opportunities are not resulting in new investments.

Please note that the services describe in this RFP do NOT include an evaluation of Maine’s economic development incentives but may include consideration for how those incentives are presented and understood as part of the investment. The State of Maine has recently revised its primary economic development incentive program, Pine Tree Development Zones through the deployment of a brand-new business incentive program called Dirigo Business Incentive Program.

Additionally, OBD maintains the state-owned and operated "SelectMaineSites.com (SMS)" website, which runs on the Zoom Prospector platform. This tool is embedded on the OBD website and is used as investment attraction tool with daily updated commercial/industrial property listings and a suite of economic development, demographic, and workforce data. As part of the overall study, bidders will prepare a non-technical analysis of this tool and compare/contrast it to other states’ usage of similar tools and recommend ways to optimize its use for improved results; and describe similar alternative applications that OBD might consider for the future.

Please also note that this effort is restricted to the lead generation and investment attraction efforts of DECD’s Office of Business Development, which may include domestic leads, international leads, and leads associated with existing Maine businesses wishing to expand. This study will not include any efforts of the Maine International Trade Center, Maine & Co., Focus Maine, or any industry-led efforts to attract specific types of investment (e.g., FOR/Maine, SEAMaine), but it may include consideration of OBD’s investment attraction efforts in the context of those organizations.

It is anticipated that any bidders currently engaged in attracting investment to the State of Maine would not be eligible for this project, as it would preclude a quality, “third-party” assessment.

1. **General Provisions**
	1. From the time the RFP is issued until award notification is made, all contact with the State regarding the RFP must be made through the RFP Coordinator. No other person/ State employee is empowered to make binding statements regarding the RFP. Violation of this provision may lead to disqualification from the bidding process, at the State’s discretion.
	2. Issuance of the RFP does not commit the Department to issue an award or to pay expenses incurred by a Bidder in the preparation of a response to the RFP. This includes attendance at personal interviews or other meetings and software or system demonstrations, where applicable.
	3. All proposals must adhere to the instructions and format requirements outlined in the RFP and all written supplements and amendments (such as the Summary of Questions and Answers), issued by the Department. Proposals are to follow the format and respond to all questions and instructions specified below in the “Proposal Submission Requirements” section of the RFP.
	4. Bidders will take careful note that in evaluating a proposal submitted in response to the RFP, the Department will consider materials provided in the proposal, information obtained through interviews/presentations (if any), and internal Departmental information of previous contract history with the Bidder (if any). The Department also reserves the right to consider other reliable references and publicly available information in evaluating a Bidder’s experience and capabilities.
	5. The proposal must be signed by a person authorized to legally bind the Bidder and must contain a statement that the proposal and the pricing contained therein will remain valid and binding for a period of 180 days from the date and time of the bid opening.
	6. The RFP and the awarded Bidder’s proposal, including all appendices or attachments, will be the basis for the final contract, as determined by the Department.
	7. Following announcement of an award decision, all submissions in response to this RFP will be public records, available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA) ([1 M.R.S. § 401](http://www.mainelegislature.org/legis/statutes/1/title1sec401.html) et seq.).
	8. The Department, at its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to the RFP.
	9. All applicable laws, whether or not herein contained, are included by this reference. It is the Bidder’s responsibility to determine the applicability and requirements of any such laws and to abide by them.
2. **Contract Term**

The Department is seeking a cost-efficient proposal to provide services, as defined in the RFP, for the anticipated contract period defined in the table below. Please note, the dates below are estimated and may be adjusted, as necessary, in order to comply with all procedural requirements associated with the RFP and the contracting process. The actual contract start date will be established by a completed and approved contract.

Contract Renewal: Following the initial term of the contract, the Department may opt to renew the contract for two renewal periods, as shown in the table below, and subject to continued availability of funding and satisfactory performance.

The term of the anticipated contract, resulting from the RFP, is defined as follows:

|  |  |  |
| --- | --- | --- |
| **Period** | **Start Date** | **End Date** |
| Initial Period of Performance | June 1, 2024 | May 30, 2025 |
| Renewal Period #1 | June 1, 2025 | May 30, 2026 |
| Renewal Period #2 | June 1, 2026 | May 30, 2027 |

1. **Number of Awards**

The Department anticipates making one (1) award as a result of the RFP process.

**PART II SCOPE OF SERVICES TO BE PROVIDED**

1. **TASKS**

OBD requires the following tasks to be performed over the twelve-month period of the contract:

1. **Review Economic Development Priorities.** Review Maine’s 10-year Economic Development Strategy as well as any other documents that OBD determines effectively describe the State’s economic development priorities. These documents are few but may include clean energy workforce documentation from the Governor’s Energy Office and investment attraction strategy documents that are internal to OBD. A review of these documents will help to contextualize this work. We do not expect the contractor to identify the most promising industries for future investment for the State of Maine. This work has already been done through the 10-year EDS process. Please note that Maine’s 10-year Economic Development Strategy is included at the end of this RFP as **Appendix F** for reference. It is anticipated that it could be reviewed while preparing a response to this RFP and then also reviewed more critically as part of Task 1 of this project (described here).
2. **Collect Data on Pipeline Leads.** Collect data (provided by OBD) on site selection/investment attraction leads that have been received by OBD. It is anticipated that leads from approximately May 2019 to the present (i.e., June 2024) will be included in this data collection effort. There was a marked decrease in leads during 2020 due to the COVID-19 pandemic. The approximate number of leads is estimated to be 100. Most of these leads consist of emails from potential investors, formal Requests for Proposal from national site selectors, and, occasionally, inquiries from existing Maine businesses seeking to expand.
3. **Analyze Site Selection Data.** Analyze the “hits” that OBD has recorded from our selectmainesites.com tool, as provided by OBD, to determine if there are any themes or if this data can add insight into this evaluation.
4. **Characterize Leads.** Assess the leads from the data collection described above and organize them by industry, total investment amount, number of jobs created, and any other attributes that the contractor suggests based on its previous experience conducting assessments of this kind.
5. **Review Incentive Packages.** Review the incentive packages developed by OBD in response to the leads describe in Task #2, above. This review will be qualitative and will enable the contractor to understand how OBD has been responding to the leads. This review should also include gathering a basic understanding of how OBD receives and processes leads (e.g., initial phone call, follow-up meetings, etc.).
6. **Conduct Interviews.** Interview the site selectors, investors and companies associated with these leads to answer a series of questions and gather feedback. This will require the contractor to develop a list of questions and queries designed to answer questions such as: why did you include Maine in your list? How did you hear about the Office of Business Development? Did Maine make it onto your short list? Why was Maine not selected – was it the site attributes? Business climate? Financial incentives, etc. and other questions designed by the contractor based on previous experience conducting assessments of this kind. Questions should also include “feedback loop” questions intended to elicit feedback on an investor/company/site selector’s overall experience working with OBD and overall impressions of the State of Maine. OBD will provide list of personnel to interview and contact information. The list will be approved by OBD before any interviews are conducted.
7. **Document Review of Business Climate.** Using publicly available articles and studies (OBD can offer several ideas here), describe the overall business climate in the State of Maine as perceived nationally. This should include categories for business in general and also entrepreneurs, as this is an area where a decent amount of data already exists.
8. **Develop Recommendations.** Based on the tasks described in #1-#6, above, develop recommendations for improvement, gap filling, and future development of a strategy for investment attraction State-wide.
9. **DELIVERABLES**

The contractor will prepare both a draft and final version of each of the deliverables described below. For each draft deliverable, OBD will have the opportunity to review and suggest revisions. Also, for each deliverable, the contractor and OBD will agree on a format and approximate length. If the contractor wishes to combine the deliverables below into one deliverable, that is acceptable provided that each deliverable numbered below is able to be easily identified within the deliverable document either through separate sections or headings.

1. **Lead Characterization.** Characterization of the leads received/pursued by OBD from May 2019 through the present, including metrics on the projects (investment amount, number of jobs, timeframe), investors/companies (size, industry, business maturity), and lead status (lost, in process, identified as opportunity, won). This characterization should also identify whether the lead was reactive or proactive and also identify the original source of the lead (e.g., selectmainesites.com, website, industry conference, etc.). This characterization is anticipated to be a narrative report that includes charts, graphs, and other means of displaying the information in a way that is effective and satisfactory to OBD. This deliverable should also include “executive summary” style conclusions (e.g., 30% of leads were forest industry and of these, 25% were from well-established companies, and 90% of these leads were lost).
2. **Lead Alignment.** Critical assessment of the alignment of OBD leads with Maine’s economic development priorities. Based on the data gathered and the tasks completed, this assessment will attempt to define how well the existing pipeline of leads from May 2019 to the present aligns with Maine’s economic development priorities. This assessment is anticipated to be mostly narrative but may rely on characterization data described in Deliverable #1 above to support its conclusions.
3. **Lead Generation.** Critical assessment of the current methods for lead generation (both reactive and proactive) and how this lead generation process could be improved.
4. **Site Selection.** Brief assessment of the effectiveness of selectmainesites.com as a tool for generating leads and encouraging site selectors to reach out to the State of Maine. This assessment will not include information technology-related data or analytics but rather it will include anecdotal data produced by interviews such as, “did you use selectmainesites.com? where did you hear about it? Was it easy to use? Have you used it since?” The results of this brief assessment are anticipated to be primarily narrative and can be included with the deliverables described above.
5. **Incentive Packages.** Critical assessment of the effectiveness of OBD’s incentive package materials, specifically the incentive packages that were prepared for the leads described in Task #2, above. This assessment will be qualitative and will be based on the contractor’s previous experience evaluating similar materials for previous clients and will also be based on the anecdotal results of the site selector/investor/company interviews.
6. **Success Rate and Reasons.** Critical assessment on the overall success rate of the leads in OBD’s pipeline from May 2019 to the present. This assessment will include quantitative measure (e.g., % in process, % potential opportunities, and % lost). If there are ways to quantitatively measure why some leads were lost, these measures should be described (e.g., 40% of leads lost were due to high energy costs, according to site selectors or 10% of site selectors for lost leads indicated that other States offered a more comprehensive package of tax incentives, etc.). This assessment should also include in-depth qualitative results described in narrative format. The qualitative results will primarily be based on an analysis of the interview results with site selectors, investors, and companies. This assessment should include high-level, executive summary-style conclusions that are easy to read and understand. This assessment should also include consistent categories of loss reasons (e.g., tax burden, energy costs, workforce constraints, transportation challenges, etc.). This section will include quantitative data but may also include higher-level discussions involving overall business climate of the State of Maine as compared with other States.
7. **Shorter-Term Gap Recommendations.** Recommendations for addressing any gaps identified in the lead generation, lead development, site selection, and incentive package development process based on the data assessment, interviews, and other work described in the tasks above (e.g., as only 15% of the leads in the pipeline were life sciences and yet this is an area of focus for the state, we recommend additional proactive lead generation for this industry). Specific recommendations are also preferred and will better enable OBD to implement the recommendations (e.g., attend BIO 2025 and employ specific lead generation and match-making strategies before the event in order to generate more quality leads). Other recommendations may be easily actionable, such as boosting the prominence of SMS globally using specific advertising or marketing methods.
8. **Recommendations for Further Strategy Development.** Draft a set of recommendations that, if implemented, will lead to the development of an Investment Attraction Strategy for the Office of Business Development. It is anticipated that renewals of this contract beyond the original 12-month period may occur in order to provide OBD with assistance in the drafting of this strategy. This renewal will occur based on the outcomes of the tasks and deliverables described above and OBD’s level of satisfaction with the overall services performed and how well the draft recommendations fit with DECD’s ability to implement them. This renewal may also occur before the initial 12-month period is completed, if the tasks described in this RFP are completed expeditiously.
9. **Other Recommendations.** List of additional recommendations that the contractor suggests based on the results of this study and previous experience in conducting similar projects. This may include assessing other business development groups in the State of Maine and/or benchmarking the amount of State budget and staff currently devoted to investment attraction against other states.

The target budgeted amount for this project is $125,000.

**PART III KEY RFP EVENTS**

1. **Questions**
	1. **General Instructions:** It is the responsibility of all Bidders and other interested parties to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions.
		1. Bidders and other interested parties should use **Appendix E** (Submitted Questions Form) for submission of questions. The form is to be submitted as a WORD document.
		2. The Submitted Questions Form must be submitted, by e-mail, and received by the RFP Coordinator identified on the cover page of the RFP as soon as possible but no later than the date and time specified on the RFP cover page.
		3. Submitted Questions must include the RFP Number and Title in the subject line of the e-mail. The Department assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt.
	2. **Question & Answer Summary:** Responses to all questions will be compiled in writing and posted on the following website no later than seven (7) calendar days prior to the proposal due date: [Division of Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain a copy of the Question & Answer Summary. Only those answers issued in writing on this website will be considered binding.
2. **Amendments**

All amendments released in regard to the RFP will also be posted on the following website: [Division of Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain amendments. Only those amendments posted on this website are considered binding.

1. **Submitting the Proposal**
	1. **Proposals Due:** Proposals must be received no later than 11:59 p.m. local time, on the date listed on the cover page of the RFP.
		1. Any e-mails containing original proposal submissions or any additional or revised proposal files, received after the 11:59 p.m. deadline, will be rejected without exception.
	2. **Delivery Instructions:** E-mail proposal submissions are to be submitted to the State of Maine Division of Procurement Services at Proposals@maine.gov.
		1. Only proposal submissions received by e-mail will be considered. The Department assumes no liability for assuring accurate/complete e-mail transmission and receipt.
			1. Proposal submission e-mails that are successfully received by the proposals@maine.gov inbox will receive an automatic reply stating as such.
		2. E-mails containing links to file sharing sites or online file repositories will not be accepted as submissions. Only e-mail proposal submissions that have the actual requested files attached will be accepted.
		3. Encrypted e-mails received which require opening attachments and logging into a proprietary system will not be accepted as submissions. Please check with your organization’s Information Technology team to ensure that your security settings will not encrypt your proposal submission.
		4. File size limits are 25MB per e-mail. Bidders may submit files separately across multiple e-mails, as necessary, due to file size concerns. All e-mails and files must be received by the due date and time listed above.
		5. Bidders are to insert the following into the subject line of their e-mail proposal submission: **“RFP# 202402052 Proposal Submission – [Bidder’s Name]”**
		6. Bidder’s proposal submissions are to be broken down into multiple files, with each file named as it is titled in bold below, and include:
* **File 1 [Bidder’s Name] – Preliminary Information:**

*PDF format preferred*

**Appendix A** (Proposal Cover Page)

**Appendix B** (Debarment, Performance and Non-Collusion Certification)

All required eligibility documentation stated in PART IV, Section I.

* **File 2 [Bidder’s Name] – Organization Qualifications and Experience:**

*PDF format preferred*

**Appendix C** (Organization Qualifications and Experience Form) and all required information and attachments stated in PART IV, Section II.

* **File 3 [Bidder’s Name] – Proposed Services:**

*PDF format preferred*

All required information and attachments stated in PART IV, Section III.

* **File 4 [Bidder’s Name] – Cost Proposal:**

PDF *format preferred*

**Appendix D** (Cost Proposal Form) and all required information and attachments stated in PART IV, Section IV.

**PART IV PROPOSAL SUBMISSION REQUIREMENTS**

This section contains instructions for Bidders to use in preparing their proposals. The Department seeks detailed yet succinct responses that demonstrate the Bidder’s qualifications, experience, and ability to perform the requirements specified throughout the RFP.

The Bidder’s proposal must follow the outline used below, including the numbering, section, and sub-section headings. Failure to use the outline specified in PART IV, or failure to respond to all questions and instructions throughout the RFP, may result in the proposal being disqualified as non-responsive or receiving a reduced score. The Department, and its evaluation team, has sole discretion to determine whether a variance from the RFP specifications will result either in disqualification or reduction in scoring of a proposal. Rephrasing of the content provided in the RFP will, at best, be considered minimally responsive.

Bidders are not to provide additional attachments beyond those specified in the RFP for the purpose of extending their response. Additional materials not requested will not be considered part of the proposal and will not be evaluated. Include any forms provided in the submission package or reproduce those forms as closely as possible. All information must be presented in the same order and format as described in the RFP.

**Proposal Format and Contents**

**Section I Preliminary Information** (File #1)

* 1. **Proposal Cover Page**

Bidders must complete **Appendix A** (Proposal Cover Page). It is critical that the cover page show the specific information requested, including Bidder address(es) and other details listed. The Proposal Cover Page must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

* 1. **Debarment, Performance and Non-Collusion Certification**

Bidders must complete **Appendix B** (Debarment, Performance and Non-Collusion Certification Form). The Debarment, Performance and Non-Collusion Certification Form must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

**Section II Organization Qualifications and Experience** (File #2)

* 1. **Overview of the Organization**

Bidders must complete **Appendix C** (Qualifications and Experience Form) describing their qualifications and skills to provide the requested services in the RFP. Bidders must include three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder’s stated qualifications and skills.

* 1. **Subcontractors**

If subcontractors are to be used, Bidders must provide a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors’ organizational capacity and qualifications.

* 1. **Organizational Chart**

Bidders must provide an organizational chart. The organizational chart must include the project being proposed. Each position must be identified by position title and corresponding to the personnel job descriptions. The most competitive proposals will showcase the depth of experience of the staff who will actually be doing the work rather than the experience of a management team who will not directly oversee the project or be involved in day-to-day work.

* 1. **Litigation**

Bidders must attach a list of all current litigation in which the Bidder is named and a list of all closed cases that have closed within the past five (5) years in which the Bidder paid the claimant either as part of a settlement or by decree.  For each, list the entity bringing suit, the complaint, the accusation, amount, and outcome.

* 1. **Certificate of Insurance**

Bidders must provide a certificate of insurance on a standard ACORD form (or the equivalent) evidencing the Bidder’s general liability, professional liability and any other relevant liability insurance policies that might be associated with the proposed services.

**Section III Proposed Services** (File #3)

* 1. **Services to be Provided**

Discuss the Scope of Services referenced above in Part II of the RFP and what the Bidder will offer. Give particular attention to describing the methods and resources you will use and how you will accomplish the tasks involved. Describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform. Description of Services should be concise yet include sufficient detail that shows the Bidder is familiar with this type of work. Bulleted lists, tables, and other methods of clearly organizing your response is preferred, rather than lengthy narratives with an abundance of background information. The description should also show that the Bidder has researched the State of Maine sufficiently to craft a smart and thoughtful response to this RFP. References to economic development strategies or industries not found in Maine (e.g., we will assess the number of automotive manufacturing leads generated each year) will result in your proposal receiving a lower score for this section.

* 1. **Implementation - Work Plan**

Provide a realistic work plan for the implementation of the program through the first contract period. Display the work plan in a timeline chart. Concisely describe each program development and implementation task, the month it will be carried out and the person or position responsible for each task. If applicable, make note of all tasks to be delegated to subcontractors. The work plan should include each of the tasks and deliverables described in Part II, above. OBD works quickly to respond to investment attraction leads and we often need to work “at the speed of business,” which may be different than other government entities. Be sure to show in your work plan how you can also work efficiently.

**Section IV** **Cost Proposal** (File #4)

* 1. **General Instructions**
		1. Bidders must submit a cost proposal that covers the period starting June 1, 2024 and ending on May 30, 2025.
		2. The cost proposal must include the costs necessary for the Bidder to fully comply with the contract terms, conditions, and RFP requirements.
		3. No costs related to the preparation of the proposal for the RFP, or to the negotiation of the contract with the Department, may be included in the proposal. Only costs to be incurred after the contract effective date that are specifically related to the implementation or operation of contracted services may be included.
	2. **Cost Proposal Form Instructions**

Bidders must fill out **Appendix D** (Cost Proposal Form), following the instructions detailed here and in the form. Failure to provide the requested information, and to follow the required cost proposal format provided, may result in the exclusion of the proposal from consideration, at the discretion of the Department.

**PART V PROPOSAL EVALUATION AND SELECTION**

Evaluation of the submitted proposals will be accomplished as follows:

1. **Evaluation Process – General Information**
	1. An evaluation team, composed of qualified reviewers, will judge the merits of the proposals received in accordance with the criteria defined in the RFP.
	2. Officials responsible for making decisions on the award selection will ensure that the selection process accords equal opportunity and appropriate consideration to all who are capable of meeting the specifications. The goals of the evaluation process are to ensure fairness and objectivity in review of the proposals and to ensure that the contract is awarded to the Bidder whose proposal provides the best value to the State of Maine.
	3. The Department reserves the right to communicate and/or schedule interviews/presentations with Bidders, if needed, to obtain clarification of information contained in the proposals received. The Department may revise the scores assigned in the initial evaluation to reflect those communications and/or interviews/presentations. Changes to proposals, including updating or adding information, will not be permitted during any interview/presentation process and, therefore, Bidders must submit proposals that present their rates and other requested information as clearly and completely as possible.
2. **Scoring Weights and Process**
	1. **Scoring Weights:** The score will be based on a 100-point scale and will measure the degree to which each proposal meets the following criteria.

**Section I. Preliminary Information (No Points)**

 Includes all elements addressed above in Part IV, Section I.

**Section II. Organization Qualifications and Experience (40 points)**

Includes all elements addressed above in Part IV, Section II.

**Section III. Proposed Services (35 points)**

Includes all elements addressed above in Part IV, Section III.

**Section IV. Cost Proposal (25 points)**

Includes all elements addressed above in Part IV, Section IV.

* 1. **Scoring Process:** For proposals that demonstrate meeting the eligibility requirements in Section I, the evaluation team will use a consensus approach to evaluate and score Sections II & III above. Members of the evaluation team will not score those sections individually but, instead, will arrive at a consensus as to assignment of points for each of those sections. Sections IV, the Cost Proposal, will be scored as described below.
	2. **Scoring the Cost Proposal:** The total cost proposed for conducting all the functions specified in the RFP will be assigned a score according to a mathematical formula. The lowest bid will be awarded 25 points. Proposals with higher bids values will be awarded proportionately fewer points calculated in comparison with the lowest bid.

The scoring formula is:

(Lowest submitted cost proposal / Cost of proposal being scored) x 25 = pro-rated score

No Best and Final Offers: The State of Maine will not seek or accept a best and final offer (BAFO) from any Bidder in this procurement process.  All Bidders are expected to provide their best value pricing with the submission of their proposal.

* 1. **Negotiations:** The Department reserves the right to negotiate with the awarded Bidder to finalize a contract. Such negotiations may not significantly vary the content, nature or requirements of the proposal or the Department’s Request for Proposal to an extent that may affect the price of goods or services requested. The Department reserves the right to terminate contract negotiations with an awarded Bidder who submits a proposed contract significantly different from the proposal they submitted in response to the advertised RFP. In the event that an acceptable contract cannot be negotiated with the highest ranked Bidder, the Department may withdraw its award and negotiate with the next-highest ranked Bidder, and so on, until an acceptable contract has been finalized. Alternatively, the Department may cancel the RFP, at its sole discretion.
1. **Selection and Award**
	1. The final decision regarding the award of the contract will be made by representatives of the Department subject to approval by the State Procurement Review Committee.
	2. Notification of conditional award selection or non-selection will be made in writing by the Department.
	3. Issuance of the RFP in no way constitutes a commitment by the State of Maine to award a contract, to pay costs incurred in the preparation of a response to the RFP, or to pay costs incurred in procuring or contracting for services, supplies, physical space, personnel or any other costs incurred by the Bidder.
	4. The Department reserves the right to reject any and all proposals or to make multiple awards.
2. **Appeal of Contract Awards**

Any person aggrieved by the award decision that results from the RFP may appeal the decision to the Director of the Bureau of General Services in the manner prescribed in [5 M.R.S.A. § 1825-E](http://www.mainelegislature.org/legis/statutes/5/title5sec1825-E.html) and [18-554 Code of Maine Rules Chapter 120](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-120).  The appeal must be in writing and filed with the Director of the Bureau of General Services, 9 State House Station, Augusta, Maine, 04333-0009 within 15 calendar days of receipt of notification of conditional contract award.

**PART VI CONTRACT ADMINISTRATION AND CONDITIONS**

1. **Contract Document**
	1. The awarded Bidder will be required to execute a State of Maine Service Contract with appropriate riders as determined by the issuing department.

The complete set of standard State of Maine Service Contract documents, along with other forms and contract documents commonly used by the State, may be found on the Division of Procurement Services’ website at the following link: [Division of Procurement Services Forms Page](https://www.maine.gov/dafs/bbm/procurementservices/forms)

* 1. Allocation of funds is final upon successful negotiation and execution of the contract, subject to the review and approval of the State Procurement Review Committee. Contracts are not considered fully executed and valid until approved by the State Procurement Review Committee and funds are encumbered. No contract will be approved based on an RFP which has an effective date less than fourteen (14) calendar days after award notification to Bidders. (Referenced in the regulations of the Department of Administrative and Financial Services, [Chapter 110, § 3(B)(i)](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-110).)

This provision means that a contract cannot be effective until at least 14 calendar days after award notification.

* 1. The State recognizes that the actual contract effective date depends upon completion of the RFP process, date of formal award notification, length of contract negotiation, and preparation and approval by the State Procurement Review Committee. Any appeals to the Department’s award decision(s) may further postpone the actual contract effective date, depending upon the outcome. The contract effective date listed in the RFP may need to be adjusted, if necessary, to comply with mandated requirements.
	2. In providing services and performing under the contract, the awarded Bidder must act as an independent contractor and not as an agent of the State of Maine.
1. **Standard State Contract Provisions**
	1. Contract Administration

Following the award, a Contract Administrator from the Department will be appointed to assist with the development and administration of the contract and to act as administrator during the entire contract period. Department staff will be available after the award to consult with the awarded Bidder in the finalization of the contract.

* 1. Payments and Other Provisions

The State anticipates paying the Contractor on the basis of net 30 payment terms, upon the receipt of an accurate and acceptable invoice. An invoice will be considered accurate and acceptable if it contains a reference to the State of Maine contract number, contains correct pricing information relative to the contract, and provides any required supporting documents, as applicable, and any other specific and agreed-upon requirements listed within the contract that results from the RFP.

**PART VII LIST OF RFP APPENDICES AND RELATED DOCUMENTS**

**Appendix A** – Proposal Cover Page

**Appendix B** – Debarment, Performance, and Non-Collusion Certification

**Appendix C** – Qualifications and Experience Form

**Appendix D** – Cost Proposal Form

**Appendix E** – Submitted Question Form

**Appendix F** – Document to Review

**APPENDIX A**

**State of Maine**

**Department of Economic & Community Development**

**PROPOSAL COVER PAGE**

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |
| **Chief Executive - Name/Title:** |  |
| **Tel:** |  | **E-mail:** |  |
| **Headquarters Street Address:** |  |
| **Headquarters City/State/Zip:** |  |
| ***(Provide information requested below if different from above)*** |
| **Lead Point of Contact for Proposal - Name/Title:** |  |
| **Tel:** |  | **E-mail:** |  |
| **Headquarters Street Address:** |  |
| **Headquarters City/State/Zip:** |  |

* This proposal and the pricing structure contained herein will remain firm for a period of 180 days from the date and time of the bid opening.
* No personnel currently employed by the Department or any other State agency participated, either directly or indirectly, in any activities relating to the preparation of the Bidder’s proposal.
* No attempt has been made, or will be made, by the Bidder to induce any other person or firm to submit or not to submit a proposal.
* The above-named organization is the legal entity entering into the resulting contract with the Department if they are awarded the contract.
* The undersigned is authorized to enter contractual obligations on behalf of the above-named organization.

*To the best of my knowledge, all information provided in the enclosed proposal, both programmatic and financial, is complete and accurate at the time of submission.*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX B**

**State of Maine**

**Department of Economic & Community Development**

**DEBARMENT, PERFORMANCE, and NON-COLLUSION CERTIFICATION**

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

*By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:*

1. *Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.*
2. *Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:*
	1. *Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or contract.*
	2. *Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.*
3. *Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification.*
4. *Have not within a three (3) year period preceding this proposal had one or more federal, state, or local government transactions terminated for cause or default*.
5. *Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above-mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX C**

**State of Maine**

**Department of Economic & Community Development**

## QUALIFICATIONS and EXPERIENCE FORM

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

|  |
| --- |
| **Present a brief statement of qualifications. Describe the history of the Bidder’s organization, especially regarding skills pertinent to the specific work required by the RFP and any special or unique characteristics of the organization which would make it especially qualified to perform the required work activities. You may expand this form and use additional pages to provide this information.** |
|  |

**APPENDIX C (continued)**

|  |
| --- |
| **Provide a description of projects that occurred within the past five years which reflect experience and expertise needed in performing the functions described in Part II – Scope of Services to be Provided of the RFP. Please note that contract history with the State of Maine, whether positive or negative, may be considered in rating proposals even if not provided by the Bidder.** |

|  |
| --- |
| **Project One** |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** |
|  |

|  |
| --- |
| **Project Two** |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** |
|  |

|  |
| --- |
| **Project Three** |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** |
|  |

**APPENDIX D**

**State of Maine**

**Department of Economic & Community Development**

**COST PROPOSAL FORM**

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |
| **Tasks #1-8 Cost** | **$** |
| **Deliverables #1-9 Cost** | **$** |
| **Subcontractor Costs** | **$** |
| **Travel and other expenses not captured above – please list details** | **$** |
| **Proposed Total Cost:** | **$** |

**Please note: When determining Cost Score during the evaluation of this RFP, only Proposed Total Cost above will be used to determine the score.**

 **APPENDIX E**

**State of Maine**

**Department of Economic & Community Development**

**SUBMITTED QUESTIONS FORM**

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

This form should be used by Bidders when submitting written questions to the RFP Coordinator as defined in Part III of the RFP.

If a question is not related to any section of the RFP, enter “N/A” under the RFP Section & Page Number. Add additional rows as necessary.

|  |  |
| --- | --- |
| **Organization Name:** |  |

|  |  |
| --- | --- |
| **RFP Section & Page Number** | **Question** |
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**APPENDIX F**

**State of Maine**

**Department of Economic & Community Development**

**RFP# 202402052**

**Investment Attraction Feedback and Strategy**

**Document to Review:**

Maine 10-year Economic Development Strategy:

<https://www.maine.gov/decd/strategic-plan>