

**State of Maine
Master Score Sheet**

RFP# 202042502					
Investment Feedback and Strategy					
Bidder Name:		Camoin Associates	Acadia Capital Management L3C	EBP-US, Inc.	Resultant, LLC
Proposed Cost:		\$92,643	\$124,998	\$124,955	\$123,798
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	40	35	25	37	33
Section III: Proposed Services	35	30	20	30	28
Section IV: Cost Proposal	25	25	18.5	18.5	18.7
TOTAL	<u>100</u>	<u>90</u>	<u>63.5</u>	<u>85.5</u>	<u>76.7</u>
Bidder Name:		OCO Consulting, LLC (dba) OCO Global	Ryse Local Ventures LLC	Opus Consulting	
Proposed Cost:		\$117,435	\$115,000	\$109,500	
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	
Section II: Organization Qualifications and Experience	40	39	29	36	
Section III: Proposed Services	35	35	25	27	
Section IV: Cost Proposal	25	19.7	20.1	21.2	
TOTAL	<u>100</u>	<u>93.7</u>	<u>74.1</u>	<u>84.2</u>	

Award Justification Statement
RFP# 202402052 Investment Feedback and Strategy

I. Summary

The State of Maine sought 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.

This study aims 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.

II. Evaluation Process

The Office of Business Development's Director comprised a team of three individuals to review proposals. The evaluators included a capital investment/site selection specialist, an economic development specialist, and a market attraction leader with previous substantial experience in public procurement within the State of Maine. The evaluators applied the consensus method in scoring the Bidders Qualifications and Experience and Proposed Services. Scores for the cost proposal were assigned using a mathematical formula.

III. Qualifications & Experience

The successful bidder's previous experience showed clear relevance to the goals and purposes of the RFP. Past projects demonstrate a track record of success.

IV. Proposed Services

The bidder's experience and qualifications in investment attraction, as well as their thoughtful and well-constructed approach and work plan yielded high scores for their proposed services and scope of work.

V. Cost Proposal

Respondent		Cost Proposal Being Scored	X	Score Weight	=	Score
OCO Consulting, LLC (dba OCO Global)		\$117,435	X	25 points	=	19.7
Acadia Capital Management L3C		\$124,998	X	25 points	=	18.5
Camoin Associates		\$92,643	X	25 points	=	25
EBP		\$124,955	X	25 points	=	18.5
Opus Consulting Partners, LLC		\$109,500	X	25 points	=	21.2
Resultant		\$123,798	X	25 points	=	18.7
Ryse Local Ventures		\$115,000	X	25 points	=	20.1

VI. Conclusion

Out of 100 points, OCO Global LLC (DBA OCO Global) scored the highest, with 93.7 points awarded by the evaluation team. The strengths of OCO Global's proposal include a strong, well-experienced organization with previous experience directly relevant to the services needed. OCO Global's thoughtful and detailed scope of services and work plan, along with their competitive cost proposal, resulted in a determination by the evaluation team that OCO Global represents the best value to the State of Maine.



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

**Janet T. Mills
Governor**

**Heather Johnson
Commissioner**

May 16, 2024

Tori McNiff
Camoin Associates
201, US Rte 1, Box 222
Scarborough, ME 04074

SUBJECT: Notice of Conditional Contract Award under RFP #202402052
Investment Feedback and Strategy

Dear Ms. McNiff:

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

- OCO Consulting, LLC (dba OCO Global)

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

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

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

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

Sincerely,

A handwritten signature in cursive script that reads "Charlotte R. Mace".

Charlotte Mace
Director, Office of Business Development
Department of Economic & Community Development

STATEMENT OF APPEAL RIGHTS

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



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May 16, 2024

Jane Haines
EBP-US, Inc.
155 Federal Street, Suite 600
Boston, MA 02110

**SUBJECT: Notice of Conditional Contract Award under RFP #202402052
Investment Feedback and Strategy**

Dear Ms. Haines:

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

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May 16, 2024

Brien C. Walton, Chairman & CSO
Acadia Capital Management L3C
499 Broadway STE 118
Bangor, ME 04401

**SUBJECT: Notice of Conditional Contract Award under RFP #202402052
Investment Feedback and Strategy**

Dear Mr. Walton,

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

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Director, Office of Business Development
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May 16, 2024

Zak Aker, Senior Consultant
Resultant, LLC
111 Monument Circle, Suite 202
Indianapolis, IN 46204

SUBJECT: Notice of Conditional Contract Award under RFP #202402052
Investment Feedback and Strategy

Dear Mr. Aker:

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

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May 16, 2024

Joe Phillips, North American Consulting Director
OCO Consulting, LLC (dba OCO Global)
215 Park Ave South, Suite 1403
New York, NY 10003

**SUBJECT: Notice of Conditional Contract Award under RFP #202402052
Investment Feedback and Strategy**

Dear Mr. Phillips:

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May 16, 2024

Kayla Baker, Founder/CEO
Ryse Local Ventures LLC
1835 7th Street NW, #204
Washington, DC 20001

SUBJECT: Notice of Conditional Contract Award under RFP #202402052
Investment Feedback and Strategy

Dear Kayla Baker:

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

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**Janet T. Mills
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**Heather Johnson
Commissioner**

May 16, 2024

Connor Yost, Partner
Opus Consulting Partners, LLC
770 Congress Street
Portland, ME 04102

SUBJECT: Notice of Conditional Contract Award under RFP #202402052
Investment Feedback and Strategy

Dear Mr. Yost:

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

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Camoin Associates

DATE: 4/25/24

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace

Names of Evaluators: Ben Sturtevant, Shae McGehee, Charlotte Mace

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35
Section III. Proposed Services	35	30
Section IV. Cost Proposal	25	25
<u>Total Points</u>	<u>100</u>	<u>90</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Camoin Associates

DATE: 4/25/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Information is included as required in the RFP

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Camoin Associates

DATE: 4/25/24

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35

Evaluation Team Comments:

I. Organization Qualifications and Experience

A. Overview of Organization

- Full-service economic development consulting firm, 25+ professional staff
- Previous projects listed include State of New Hampshire (analyze and identify the most competitive sectors for attraction); Missouri Partnership (lead generation and digital engagement tracking for target industry lead generation campaigns); Southern Carolina Alliance (targeted lead generation services and geographic marketing missions on an ongoing basis since 2012); strong, relevant experience

B. Subcontractors

- None

C. Organizational Chart

- Project will be led by Rob Camoin (CEO) and Tori McNiff (Project Manager); and Vice President Karen Meier

D. Litigation

- N/A

E. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Camoin Associates

DATE: 4/25/24

EVALUATION OF SECTION III

Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	30

Evaluation Team Comments:

II. Proposed Services

A. Services to be Provided

- Focus on lead generation – which is part of it, but not the central concern, so this could have been stronger
- An assessment of the lead sources, the process for nurturing them, outreach tools, characteristics of business leads, a review of the incentive package offered, etc.
- A comprehensive assessment of the quality and characteristics of the leads and determine why they were lost and won
- ProspectEngage: proprietary platform which helps clients leverage their websites to generate high-quality capital investment prospects.
- Approach (nice, concise list):
 - Investment Attraction Assessment
 - Collateral and Program Review
 - Digital Tool Assessment/Capacity
 - Strategy Development
- Task 1: Project Kickoff
- Task 2: Review Target Industries & the Business Climate (favorable development environment, environmental regulations, labor regulations, tax environment, incentives, tax exemptions) – page 16 is strong
- Task 3 – Business Development Team Interviews
- Task 4- Data Collection and Analysis: ProspectEngage
- Task 5 – Site Selector & Company Interviews
- Task 6 – Develop Recommendations

B. Implementation – Work Plan

- Detailed work plan (table), with assigned staff

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Camoin Associates

DATE: 4/25/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$92,643		\$92,643	x	25 points	=	25

Evaluation Team Comments:

- Cost proposal was complete and clear.
- No subcontractor costs
- \$2,203 in travel costs.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Acadia Capital Management L3C

DATE: 4/25/24

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace

Names of Evaluators: Ben Sturtevant, Shae McGehee, Charlotte Mace

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	25
Section III. Proposed Services	35	20
Section IV. Cost Proposal	25	18.5
<u>Total Points</u>	<u>100</u>	<u>63.5</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Acadia Capital Management L3C

DATE: 4/25/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- Cost proposal is complete and clear.
- Subcontractor costs comprise \$50,000

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Acadia Capital Management L3C

DATE: 4/25/24

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	25

Evaluation Team Comments:

I. Organization Qualifications and Experience

A. Overview of Organization

- Maine-based non-profit, minority-controlled U.S. Treasury-certified CDE
- Local Knowledge and Networks
- Sector-specific experience
- Data-driven approach
- Strategic partnerships
- Capabilities in financial incentives:
 - In-depth understanding on incentive programs
 - Customized solutions
 - Compliance and due diligence
 - Long-term impact assessment
- Distinguishing Characteristics:
 - Hybrid Model (combining social mission with profit motive of traditional investment firms)
 - Local Expertise and Commitment
 - Innovative Approaches
 - Track Record of Success
 - Previous Projects: FAME (Thrive 2 program); GPCOG (Domestic Trade Pilot Program); Maine DECD (Peter DelGreco, with Denise as the contact; previous projects aren't directly related to the work described in the RFP, except for Maine & Co., which the RFP indicates is not preferred as an organization engaged in investment attraction currently in the State of Maine)

B. Subcontractors

- Maine & Co. (Peter DelGreco)
- “simply facilitating access” as they are engaged in the attraction of ventures to Maine; not sure how this warrants half the budget

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Acadia Capital Management L3C

DATE: 4/25/24

C. Organizational Chart

- Brien at the top; then Director, Business Process Management, then Director, Community Engagement, then subcontractor Peter DelGreco

D. Litigation

- N/A

E. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Acadia Capital Management L3C

DATE: 4/25/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	20

Evaluation Team Comments:

I. Proposed Services

A. Services to be Provided

- Review Economic Development Priorities
- Collect Data on Pipeline Leads
- Analyze Site Selection Data
- Characterize Leads
- Review Incentives Packages (Maine & Co. will review out incentive packages and identify strengths and weaknesses)
- Conduct Interviews
- Document Review of Business Climate
- Develop Recommendations
- Description of work plan/implementation strategies are weak and lack sufficient detail on specific strategies and assessment methods for data analysis and interviews.
- Not enough meat on the bones of this proposal – strategies, methods used previously with success; examples of potential interview questions, example of sources for business climate, etc.

F. Implementation – Work Plan

- Timeline isn't specific to certain months but does include general timeframes (e.g., "completed by month 8")
- Timeline doesn't specify who will do what; needs more detail

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Acadia Capital Management L3C

DATE: 4/25/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$92,643	,	\$124,998	x	25 points	=	18.5

Evaluation Team Comments:

- Cost proposal is clear and complete.
- Subcontractor costs are \$50,000

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: EBP

DATE: 4/25/24

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace

Names of Evaluators: Ben Sturtevant, Shae McGehee, Charlotte Mace

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	37
Section III. Proposed Services	35	30
Section IV. Cost Proposal	25	18.5
<u>Total Points</u>	<u>100</u>	<u>85.5</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: EBP

DATE: 4/25/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Proposal includes required information.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: EBP

DATE: 4/25/24

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	37

Evaluation Team Comments:

- I. Organization Qualifications and Experience
 - A. Overview of Organization
 - Boston, MA (founded in 1996)
 - Previous experience evaluating Maine incentive programs
 - A focus on generating tangible results
 - Proven methodologies and tools
 - In-depth knowledge of the global site selection market
 - Knowledge of the dynamic global investment climate
 - Previous project listed do not include investment attraction, per se
 - Proposal well-organized and detailed
 - Previous experience evaluating Maine’s economic development incentives
 - City of Vancouver experience was cluster-building, but unclear what portions of this project were investment attraction
 - Previous experience functioning as an independent reviewer
 - Really strong previous experience overall
 - B. Subcontractors
 - None
 - C. Organizational Chart
 - Officer in Charge at top, then Project Manager below, then three analysts below that
 - D. Litigation
 - None
 - E. Certificate of Insurance

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: EBP

DATE: 4/25/24

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: EBP

DATE: 4/25/24

EVALUATION OF SECTION III

Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	30

Evaluation Team Comments:

I. Proposed Services

A. Services to be Provided

- Project Management and Coordination
- Project Kick-Off Meeting
- Progress Meetings
- Review Economic Development Priorities
 1. Nice list here (Forest Products/Manufacturing, Tech Services/Mgf; Tech Services/Food Systems, Other (tourism, outdoor rec, etc.) – this list shows a solid review of our 10-year plan and a familiarization with Maine which the RFP specifically asked for
- Collect Data on Pipeline Leads
- Analyze Site Selection Data (key words and search data from selectmainesites.com); good detail here
- Characterize Leads
- Interim Report
- Review Incentive Packages
 1. Overall, strong detail on their approach and how they will organize/tackle the tasks
- Conduct interviews
- Document Review of Business Climate –
 1. really good list here as well
- Develop Recommendations
- Final Report and Recommendations
- Proposed Services was described well and thoughtfully done and responsive to the RFP

B. Implementation – Work Plan

- Organized well in a chart
- “Working at the speed of business – their approach” - good
- Work plan organized by task and deliverable map

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: EBP

DATE: 4/25/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$92,643		\$124,955	x	25 points	=	18.5

Evaluation Team Comments:

- Cost proposal is complete and clear.
- No subcontractor costs.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052
RFP TITLE: Investment Attraction Feedback and Strategy
BIDDER: Resultant
DATE: 4/25/24

SUMMARY PAGE

Department Name: Department of Economic & Community Development
Name of RFP Coordinator: Charlotte Mace
Names of Evaluators: Ben Sturtevant, Shae McGehee, Charlotte Mace

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	33
Section III. Proposed Services	35	28
Section IV. Cost Proposal	35	18.7
<u>Total Points</u>	<u>100</u>	<u>76.7</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Resultant

DATE: 4/25/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Proposal included the required information.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052
RFP TITLE: Investment Attraction Feedback and Strategy
BIDDER: Resultant
DATE: 4/25/24

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	33

Evaluation Team Comments:

- I. Organization Qualifications and Experience
 - A. Overview of Organization
 - Indianapolis, Indiana
 - Was Mike Vance’s signature a real signature – doesn’t look like it
 - Human-centered consulting firm
 - They’ve done work in Vermont
 - Project for Indiana Economic Development Corporation – CEDS development for the State – good but not directly relevant
 - High-level assessment they are currently doing for the City of Indianapolis on the function of Economic Development – also good but not directly relevant
 - B. Subcontractors
 - Katz, Sapper & Miller (CPA) firm
 - For this project, this subcontractor will include team members with government and site selection expertise, offering a comprehensive solution tailored to your needs.
 - KSM Location Advisors has assisted clients in securing \$1.4B state and local incentives, advising them on incentive programs in states
 - Work seems to be incentives focused
 - C. Organizational Chart
 - Executive Sponsor at the top; Engagement Manager below; then three at same level (senior consultant, economic development SME, and site consultant); then a business analysis that reports to the senior consultant
 - Resumes include primary backgrounds in education, workforce development, and incentives; as well as public affairs and consensus-building

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Resultant

DATE: 4/25/24

D. Litigation

- N/A

E. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Resultant

DATE: 4/25/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	28

Evaluation Team Comments:

I. Proposed Services

A. Services to be Provided

- Integrated Delivery Approach
- Division of Labor: Resultant and KSM Collaboration
- Travel (two trips to Maine)
- Task 1: Review Economic Priorities
 1. Review of workforce development initiatives (this was not in the RFP and isn't a focus of this work)
- Task 2: Collect Data on Pipeline Leads
- Task 3: Analyze Site Selection Data
 1. They will clean and organize the data
 2. They will examine metrics such as frequency of site visits (not quite relevant for the way site selection works in Maine)
 3. Nice reproduction of the ven diagram from the 10-year EDS with a nice list of industries of focus (see page 5)
- Task 4: Characterize Leads
- Task 5: Review Incentive Packages
 1. Including journey mapping
- Task 6: Conduct Interviews
 1. Interviews to include small business employers in Maine that have taken advantage of incentives (this isn't what we want included in this project); interviews with large employers in Maine that have taken advantage of the incentives (the RFP was clear that this is not an evaluation of our economic development incentives and that this work is already being done);
 2. They did not include site selectors which is a primary interview target; this proposal has misalignment with the RFP in several areas, including this one
- Task 7: Document Review of Business

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Resultant

DATE: 4/25/24

1. They reference the September 2023 10-year EDS Progress Report, which is good
- Task 8: Develop Recommendations
 1. To include gap analysis
- B. Implementation – Work Plan
- Gantt Chart Flexibility
 - Aggressive timeline; might not be possible (September 30 for finishing most deliverables); perhaps unrealistic (especially over the summer months)
 - Line Ownership – seems to be a mix of both Resultant and KSM
 - Work Plan is brief, could have been stronger

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Resultant

DATE: 4/25/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$92,643		\$123,798	x	25 points	=	18.7

Evaluation Team Comments:

- Cost proposal was complete and clear.
- \$47,470 in subcontractor costs.
- \$3,000 in travel.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: OCO Consulting, LLC (dba) OCO Global

DATE: 4/25/24

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace

Names of Evaluators: Ben Sturtevant, Shae McGehee, Charlotte Mace

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	39
Section III. Proposed Services	35	35
Section IV. Cost Proposal	25	19.7
<u>Total Points</u>	<u>100</u>	<u>93.7</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: OCO Consulting, LLC (dba) OCO Global

DATE: 4/25/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Proposal included required information.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: OCO Consulting, LLC (dba) OCO Global

DATE: 4/25/24

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	39

Evaluation Team Comments:

I. Organization Qualifications and Experience

A. Overview of Organization

- Belfast, UK
- Specializes in international trade
- Delivered investment promotion assignments to over 400 global EDOs
- Analysis of Leads to Determine Quality leads
- Strategy for Targeting Leads that lead to landed projects, increasing OBD's success rate
- Recommendations on improvement of processes for handling leads
- Action plan and clear recommendations on how to implement the strategy
 1. Previous experience seems to be primarily international trade/FDI
- Previous project for Select Greater Philadelphia was quite similar to the expertise needed here: identified immediate lead opportunities & profiles, sector-specific opportunities, identified additional sector niches, and how to develop and advance these engagements into investment leads with stakeholders
- Previous project for Business Oregon is directly relevant; the study highlighted lead qualification, business climate analysis, and how to streamline account management with stakeholders
- Previous project with Missouri Partnership is relevant: We provide investment prospection in Missouri's target sectors (Advanced Manufacturing, Global AgTech, Logistics, Energy Solutions, Financial and Professional Solutions, Health Innovation and Food Solutions, as well as support for Missouri companies wishing to export to new International Markets.
- Some awkward language in the response (minor)

B. Subcontractors

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: OCO Consulting, LLC (dba) OCO Global

DATE: 4/25/24

C. Organizational Chart

- Joe Phillips, Project Director at top; Abbey Merrill Project Manager, just below; then a Project Quality Assurance Manager and a Research Support person next.

D. Litigation

- N/A

E. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: OCO Consulting, LLC (dba) OCO Global

DATE: 4/25/24

EVALUATION OF SECTION III

Proposed Services

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	35

Evaluation Team Comments:

I. Proposed Services

A. Services to be Provided

- Phase 1 – Kick-Off
- Phase 2 – Research Phase (Literature Review, Consultation Interviews, Business Climate Analysis [great list here – Economic Environment, Regulatory Environment, Incentives, Availability of Workforce, Infrastructure & Connectivity])
- Phase 3 – Leads Analysis
- Collection of Leads Based on Pipeline
- Analysis & characterization of leads
- Phase 4 – Account Management Analysis [excellent flow chart on page 10]
- Phase 5 – Final Report & Recommendations
- Great description of these tasks with good detail
- Overall, proposal was highly responsive to the RFP and of high quality

B. Implementation – Work Plan

- Project Implementation
 1. Regular status calls
 2. Proactive engagement and involvement in meetings
 3. Key point of contact
 4. Quality control and assurance
 5. Up-skilling philosophy
 6. Commitment to confidentiality
- Detailed work plan table with descriptions of tasks
- Proposed Project Timeline
- 8-month work plan

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: OCO Consulting, LLC (dba) OCO Global

DATE: 4/25/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$92,643	,	\$117,435	x	25 points	=	19.7

Evaluation Team Comments:

Cost proposal was completed and clear.
No subcontractor costs.
\$5,200 for travel.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Ryse Local Ventures

DATE: 4/25/24

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace

Names of Evaluators: Ben Sturtevant, Shae McGehee, Charlotte Mace

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	29
Section III. Proposed Services	35	25
Section IV. Cost Proposal	25	20.1
<u>Total Points</u>	<u>100</u>	<u>74.1</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Ryse Local Ventures

DATE: 4/25/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Proposal included the required information.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Ryse Local Ventures

DATE: 4/25/24

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	29

Evaluation Team Comments:

I. Organization Qualifications and Experience

A. Overview of Organization

- Washington DC
- Economic justice consulting firm
- Skills: Research & Strategy; Interviews & Focus Groups; Project Management
- Deep commitment to equitable economic development, opportunity and social justice
- Culturally competent strategy
- Values
- Previous Experience:
 - Momentus Capital – Lead architect of the Momentus Capital Washington D.C. (headquarters) market development strategy that established the organization’s first formal small business development pipeline.
 - Justice Climate Fund – Co-Lead architect of the investment strategy on a winning solicitation for a nearly \$1 billion award to the Justice Climate Fund from the U.S. Environmental Protection Agency’s Greenhouse Gas Reduction Fund (GGRF) Clean Communities Investment Accelerator (CCIA).
- Previous clients:
 - CEI (Daniel Wallace); project was Evaluation of Equitable Lending and Investment Strategy
 - Higher Purpose Company; Annual Higher Purpose Co. (HPC) Membership Experience Evaluation
 - US Department of Treasury: SSBCI project
 - Experience not directly related to the tasks described in the RFP; not a strong link to the proposed work

B. Subcontractors

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Ryse Local Ventures

DATE: 4/25/24

- Unclear?

C. Organizational Chart

- Kayla at the top and then “Business” and “Policy” below and then below that, Kiley, Quentin, and Shivani; it’s a bit confusing; Kiley and Shivani are Business and Quentin is Policy; there is no policy work in this RFP, so it’s unclear if this is an org chart just for this project or for the company in general

D. Litigation

- N/A

E. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Ryse Local Ventures

DATE: 4/25/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	25

Evaluation Team Comments:

II. Proposed Services

A. Services to be Provided

- Mostly a re-listing of what was in the RFP
- They specify the 7 strategies of the 10-year EDS; which is not what the RFP asked them to do.
- Very minimal on details
- Overall, not a well-constructed or responsive proposal for the RFP

B. Implementation – Work Plan

- Work plan is just a timeline, not really a work plan
- Not a lot of detail on the work plan – who will do which tasks?
- 11-month plan

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202042502

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Ryse Local Ventures

DATE: 4/25/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$92,643	,	\$115,000	x	25 points	=	20.1

Evaluation Team Comments:

- Cost proposal was complete and clear.
- No subcontractor costs.
- \$5,000 in travel costs – no travel breakdown?

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Opus Consulting Partners, LLC

DATE: 4/25/24

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace

Names of Evaluators: Ben Sturtevant, Shae McGehee, Charlotte Mace

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	36
Section III. Proposed Services	35	27
Section IV. Cost Proposal	25	21.2
<u>Total Points</u>	<u>100</u>	<u>84.2</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Opus Consulting Partners, LLC

DATE: 4/25/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Proposal included required information.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Opus Consulting Partners, LLC

DATE: 4/25/24

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	36

Evaluation Team Comments:

- I. Organization Qualifications and Experience
 - A. Overview of Organization
 - Business consulting firm
 - Previous project with Northern Forest Center (Statewide Market Assessment for Affordable, Net Zero Energy Homes in Maine) – not relevant except that it was work in Maine
 - Another project to identify potential sites for business expansion – yes, tangentially relevant
 - Another project for Spurwink to help with strategic planning (not relevant)
 - B. Subcontractors
 - None
 - C. Organizational Chart
 - Principal and Partner on top; then two senior consultants and a COO; then three consultants; then a sales coordinator and office manager; only certain personnel are highlighted in orange and will work on this project
 - D. Litigation
 - N/A
 - E. Certificate of Insurance
 - Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Opus Consulting Partners, LLC

DATE: 4/25/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	27

Evaluation Team Comments:

II. Proposed Services

A. Services to be Provided

- Review Maine’s Economic Development Priorities
- Collect Data on Pipeline Leads
- Analyze Site Selection Data
- Characterize Leads
- Review Incentive Packages
- Conduct Interviews
 - This is really the only section with some good detail; the list of questions is robust
- Document Review of Business Climate
- Develop Recommendations
 - Includes multi-level SWOT (good)
- Proposal could have included more detail on their approach and strategies; the content was mostly a regurgitation of the RFP
- They could have expanded on their previous experience in this area, especially with the manufacturer in MA

B. Implementation – Work Plan

- Detailed work plan

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER: Opus Consulting Partners, LLC

DATE: 4/25/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$92,643	,	\$109,500	x	25 points	=	21.2

Evaluation Team Comments:

- Cost proposal is complete and clear.
- No subcontractor costs.
- No travel costs.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Camoin Associates

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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
 - “We work with public officials to target resources to improve the business climate in communities”
 - Completed similar projects “designing targeted business outreach strategies that promote the region or states’ strengths and competitive advantages when it came to attracting new companies and jobs.” Including a project in New Hampshire to create a strategy to attract private investment to NH demonstrating previous experience in a nearby state.
 2. Subcontractors
 - Not using subcontractors
 3. Organizational Chart
 - CEO/President is project lead
 - Team includes industry advisors and researchers
 4. Litigation
 - Not under current litigation and have not been under litigation in the past 5 years
 5. Certificate of Insurance
 - attached

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Camoin Associates

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

II. Proposed Services

1. Services to be Provided

- “Assessment of the lead sources, the process of nurturing them, outreach tool, characteristics of business leads, a review of the incentive package offered, etc.”
- “A comprehensive assessment of the quality and characteristics of the leads and determine why they were lost and won”
- Task 1 – Kick off
- Task 2 – Review Target Industries & the business climate; previous experience working with DECD and partner organizations
- Task 3 – Business Development Team Interviews; this is outside of the scope of the RFP, interviews are for site selectors, investors, and companies per RFP
- Task 4 – Data Collection & Analysis, “customized dashboard that displays each of the 100 potential leads” – this task is outside the scope of the RFP, unclear what value a dynamic tool of static information would hold compared to research to develop a strategy for investment attraction.

2. Implementation – Work Plan

- *9 month project*
- *Organized, detailed, and realistic work plan*
- *Task 3 is outside scope of RFP*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Camoin

DATE: 4/19/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- Camoin has experience in most of Maine's investment attraction industrial sectors
- Existing partnerships with DECD on Domestic Trade Grant program, market reports
- Lead generation experts with strong understanding of DECD's business development/attraction goals and processes
- Developed similar analysis/strategy for State of NH
- Lead generation projects for Missouri and South Carolina

2. Subcontractors

- None

3. Organizational Chart

- Included, CEO Rob Camoin to lead project with Tori McNiff as Project Manager

4. Litigation

- None

5. Certificate of Insurance

- Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Camoin

DATE: 4/19/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

II. Proposed Services

1. Services to be Provided

- Investment attraction assessment
- Existing program review
- Business climate rankings
- Collateral and website tools review
- Data collection and analysis
- Lead qualifications
- Strategy development
- Prospect Engage web dashboard
- Final recommendations

2. Implementation – Work Plan

- Included. Schedule of activities seems realistic for work to be done.
8-month turnaround

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Camoin

DATE: 4/23/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- Full-service economic development consulting firm, 25+ professional staff
- Previous projects listed include State of New Hampshire (analyze and identify the most competitive sectors for attraction); Missouri Partnership (lead generation and digital engagement tracking for target industry lead generation campaigns); Southern Carolina Alliance (targeted lead generation services and geographic marketing missions on a ongoing basis since 2012); good, relevant experience

•

2. Subcontractors

- None

3. Organizational Chart

- Project will be led by Rob Camoin (CEO) and Tori McNiff (Project Manager); and Vice President Karen Meier

4. Litigation

- N/A

5. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Camoin

DATE: 4/23/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Included

II. Proposed Services

1. Services to be Provided

- Focus on lead generation – which is part of it, but not the central concern
- An assessment of the lead sources, the process for nurturing them, outreach tools, characteristics of business leads, a review of the incentive package offered, etc.
- A comprehensive assessment of the quality and characteristics of the leads and determine why they were lost and won
- ProspectEngage: proprietary platform which helps clients leverage their websites to generate high-quality capital investment prospects.
- Approach (nice, concise list):
 - Investment Attraction Assessment
 - Collateral and Program Review
 - Digital Tool Assessment/Capacity
 - Strategy Development
- Task 1: Project Kickoff
- Task 2: Review Target Industries & the Business Climate (favorable development environment, environmental regulations, labor regulations, tax environment, incentives, tax exemptions) – page 16 is strong
- Task 3 – Business Development Team Interviews
- Task 4- Data Collection and Analysis – why the dashboard? They are suggesting ProspectEngage
- Task 5 – Site Selector & Company Interviews
- Task 6 – Develop Recommendations

2. Implementation – Work Plan

- Detailed work plan (table), with assigned staff

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Acadia Capital Management L3C

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- “while we do not engage in the business of attracting companies to Maine – we support the entities that do provide that service to facilitate business development throughout the state.”
- “we specialize in designing customized incentive packages tailored to the specific needs and priorities of target businesses.” Can a business specialize in incentive packages and not be engaged in attracting investment?
- Has acted as reviewers of business applicants to FAME and GPCOG funding programs

2. Subcontractors

- From RFP “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.”
- Peter Delgraco, president of Maine and Co facilitating lead interviews – “Maine & Co. is simply facilitating access so that ACM team can collect objective data points without any actual or perceived bias” This contractor and their role in the project appears to conflict with the RFP statement quoted above.

3. Organizational Chart

- Team of 3 plus subcontractor
 - 1. PhD in Education and Law

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Acadia Capital Management L3C

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

2. PhD in education

4. Litigation

- Not applicable

5. Certificate of Insurance

- Not included

II. Proposed Services

1. Services to be Provided

- Relies heavily on Maine & Co's experience – this conflicts with the RFP statement that organizations active in investment attraction are not eligible to apply to ensure a quality, third party review and recommendations.
- Task 1 – Review Economic Development Priorities
- Task 2 – Collect Data on Pipeline Leads
- Task 3 – Analyze Site Selection Data; “Maine & Co. also has strong relationships with the commercial real estate community across the state. We will work with them to assess the efficacy of this tool for sharing property listings”
- Task 4 – Characterize Leads
- Task 5 – Review Incentive Packages; “Leveraging Maine & Co.'s 25 years of experience advancing projects through Maine's business attraction pipeline, ACM3 will thoroughly review OBD's incentive packages and identify their strengths and weaknesses in relation to other successful projects.”
- Task 6 – Conduct Interviews; “Maine & Co. will use a two-part data collection process. We will first attempt to connect with all leads generated by OBD since approximately May 2019, and will provide them each with a survey. Survey results will be compiled into quantitative data. Maine & Co. will use survey results and several other factors to select up to 25 interview participants. Maine & Co. will conduct a minimum of 10 interviews in person, with as many scheduled in person as possible.”
- Task 7 – Document Review of Business Climate
- Task 8 – Develop Recommendations

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Acadia Capital Management L3C

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

2. Implementation – Work Plan

- *12 month project*
- *Limited detail in the work plan and timeline; language included is very similar to direction RFP provided when one would expect further details on how the work will be completed*
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Acadia Capital Management L3C

DATE: 4/18/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- Non-profit, minority owned entity
- Uncertain whether they have experience in all of the optimal investment attraction sectors the State has targeted
- Existing partnerships with FAME, GPCOG, DECD (outlined in past projects).
- CEO serves on Maine Venture Fund's Board
- Solid grasp on state's tax incentives and financial assistance programs
- Have worked on a number of projects requiring analysis of businesses
- May lack experience working with site selection analysis.

2. Subcontractors

- Maine & Co. (works closely with DECD on site selection projects)

3. Organizational Chart

- Included, CEI Brien Walton

4. Litigation

- None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Acadia Capital Management L3C

DATE: 4/18/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

5. Certificate of Insurance
 - Not included
- II. Proposed Services
1. Services to be Provided
 - Receive and collect data on leads
 - Collect Data on Pipeline Leads
 - Analyze selectmainesites.com
 - Characterize leads
 - Competitive analysis
 - Interviews
 - Review and compare business climate to other states
 - Recommendations
 2. Implementation – Work Plan
 - Unclear on schedule of deliverables. 1 year or 8 month timeframe for steps 1-8

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Acadia Capital Management L3C

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- Non-profit, minority-controlled U.S. Treasury-certified CDE
- Local Knowledge and Networks
- Sector-specific experience
- Data-driven approach
- Strategic partnerships
- Capabilities in financial incentives:
 - In-depth understanding on incentive programs
 - Customized solutions
 - Compliance and due diligence
 - Long-term impact assessment
- Distinguishing Characteristics:
 - Hybrid Model (combining social mission with profit motive of traditional investment firms)
 - Local Expertise and Commitment
 - Innovative Approaches
 - Track Record of Success
 - Previous Projects: FAME (Thrive 2 program); GPCOG (Domestic Trade Pilot Program); Maine DECD (Peter DelGreco, with Denise as the contact)

2. Subcontractors

- Maine & Co. (Peter DelGreco)
- “simply facilitating access” as they are engaged in the attraction of ventures to Maine

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Acadia Capital Management L3C

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

3. Organizational Chart

- Brien at the top; then Director, Business Process Management, then Director, Community Engagement, then subcontractor Peter DelGreco

4. Litigation

- N/A

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

- Review Economic Development Priorities
- Collect Data on Pipeline Leads
- Analyze Site Selection Data
- Characterize Leads
- Review Incentives Packages (Maine & Co. will review out incentive packages and identify strengths and weaknesses)
- Conduct Interviews
- Document Review of Business Climate
- Develop Recommendations
- Description of work plan/implementation strategies are very concise and lacking sufficient detail on specific strategies and assessment methods for data analysis and interviews.

2. Implementation – Work Plan

- Timeline isn't specific to certain months but does include general timeframes (e.g., "completed by month 8")

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: EBP-US, Inc

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- “history of providing trusted advice based on detailed research and analysis.”
- “Our work is consistently centered on improving the state-of-the-art in objective analysis to help empower public and private clients to better plan and implement efficient, sustainable actions that serve to grow jobs, increase incomes, reduce disparities, and enhance quality of life.
- “previous independent reviewer of Maine’s economic development and R&D investments,”
- Project experience provided focused on incentives (ME & Edmonton); third project relates to cluster building

2. Subcontractors

- No subcontractors

3. Organizational Chart

- Team of 5
- Chris Steele, Officer in charge – significant investment attraction experience in resume

4. Litigation

- Nothing of note

5. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: EBP-US, Inc

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- included

II. Proposed Services

1. Services to be Provided

- Very detailed, builds out RFP tasks, includes visuals to communicate process
- Task 0 – Project Management and Coordination
- Task 1 – Review Economic Development Priorities
- Task 2 – Collect Data on Pipeline Leads
- Task 3 – Analyze Site Selection Data
- Task 4 – Characterize Leads; provides table of lead categorization components
- Task 5 – Review Incentive Packages
- Task 6 – Conduct Interviews; expands on task to include: “In addition to OBD’s stakeholder list, we propose conducting a joint stakeholder mapping exercise and drafting interview inclusion criteria to source any additional contacts that would be helpful to solicit feedback. This will ensure OBD understands potential blind spots in its processes and that we conduct outreach with stakeholders who may never formally interact with DECD.”
- Task 7 – Document Review of Business Climate
- Task 8 – Develop Recommendations

2. Implementation – Work Plan

- *1 year*
- *Very detailed includes person assigned to work*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: EBP

DATE: 4/19/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Economic Development Research and Analysis firm with experience in site selection and how companies decide on location / expansion
- Has worked with Maine DECD on incentives and with Maine's OPEGA office on analysis of existing economic development programs
- Experience with some of Maine's preferred investment attraction sectors, including life sciences, and IT
- CEO has strong background in site selection, having worked with Ernst and Young in that capacity, along with expertise in transportation infrastructure (ports and rail), freight / logistics; commercial real estate
- Projects: Maine DECD incentives evaluation project; Edmonton Global design of incentives programs and sector analysis project; City of Vancouver life sciences cluster-building project
- Projects don't demonstrate direct experience in creating investment attraction strategy.

2. Subcontractors

- None

- Organizational Chart: Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: EBP

DATE: 4/19/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

3. Litigation
 - None

 4. Certificate of Insurance
 - Included
- II. Proposed Services
1. Services to be Provided
 - Project Management and coordination
 - Review economic development priorities
 - Collect data on leads
 - Analysis of Site Selection website selectmainesites.com, including keyword/search data
 - Lead characterization – proposes a detailed analysis of leads in relation to Maine’s investment attraction sectors, including an interim report
 - Review incentives packages, which they are familiar with already
 - Conduct interviews
 - Review business climate and supply spreadsheet of article and references
 - Recommendations and final report
 - RFP is well-designed and written. Easy to decipher.

 2. Implementation – Work Plan
 - Included. Roughly a 12-month plan with strong details on tasks and which staff member will lead and support the work, including task/deliverables map

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: EBP

DATE: 4/18/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Boston, MA (founded in 1996)
 - Previous experience evaluating Maine incentive programs
 - A focus on generating tangible results
 - Proven methodologies and tools
 - In-depth knowledge of the global site selection market
 - Knowledge of the dynamic global investment climate
 - Previous project listed do not include investment attraction, per se
 2. Subcontractors
 - None
 3. Organizational Chart
 - Officer in Charge at top, then Project Manager below, then three analysts below that
 4. Litigation
 - None
 5. Certificate of Insurance
 - Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: EBP

DATE: 4/18/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

II. Proposed Services

1. Services to be Provided

- Project Management and Coordination
- Project Kick-Off Meeting
- Progress Meetings
- Review Economic Development Priorities
 1. Nice list here (Forest Products/Manufacturing, Tech Services/Mgf; Tech Services/Food Systems, Other (tourism, outdoor rec, etc.) – this list shows a solid review of our 10-year plan and a familiarization with Maine which the RFP specifically asked for
- Collect Data on Pipeline Leads
- Analyze Site Selection Data
- Characterize Leads
- Interim Report
- Review Incentive Packages
 1. Overall, good detail on their approach and how they will organize/tackle the tasks
- Conduct interviews
- Document Review of Business Climate –
 1. really good list here as well
- Develop Recommendations
- Final Report and Recommendations

2. Implementation – Work Plan

- Organized well in a chart
- “Working at the speed of business – their approach”
- Work plan organized by task and deliverable map

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Resultant

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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
 - Focusing on their skills to address workforce challenges but this project is about investment attraction
 - 2. Subcontractors
 - Katz, Sapper, & Miller – Advisory, Tax, and Audit Firm
 - 3. Organizational Chart
 - 6 team members on project, 2 of them are sub-contractors
 - 4. Litigation
 - None
 - 5. Certificate of Insurance
 - Included
- II. Proposed Services
 - 1. Services to be Provided
 - Limited expansion from RFP and description of how work will be completed
 - Task 1 – Review Economic Priorities
 - Task 2 – Collect Data on Pipeline Leads
 - Task 3 – Analyze Site Selection Data, Resultant and KSM
 - Task 4 – Characterize Leads, Resultant and KSM

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Resultant

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Task 5 – Review Incentive Package, KSM
 - Task 6 – Conduct Interviews, Resultant and KSM
 - Task 7 - Document Review of Business, Resultant and KSM
 - Task 8 – Develop Recommendations, Resultant and KSM
2. Implementation – Work Plan
- *3 months, this is not a realistic timeline considering time it takes to schedule and complete the interviews for task 6*
 - *Work appears evenly split between Resultant and KSM*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Resultant

DATE: 4/24/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Resultant is a large, Indianapolis-based consulting company (450 employees) that offers a number of services
- They discuss workforce development , training, labor as a focus for the firm in intro.
- Little to no mention of site selection and leads generation experience in background summary
- No experience working in Maine or with the various sectors OBD's business attraction activities are geared toward
- Projects: Florida Dept of Commerce – existing project on workforce program ROI; Indiana Economic Development Corp. – CEDs project, vendor assessment; City of Indianapolis – evaluation of Indy's economic development function

2. Subcontractors

- Katz, Sapper and Miller CPA firm (large company 500 employees)
- Organizational Chart: Included 4 employees from Resultant; two from subcontractor, resumes also included from applicant
- Litigation: None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Resultant

DATE: 4/24/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

3. Certificate of Insurance
 - Included
- II. Proposed Services
1. Services to be Provided
 - Overall, good detail in proposal, tasks to include:
 - Review economic development priorities, which includes 2 trips to Maine, review of EDS document
 - Collect data on pipeline leads with matrix format
 - Qualitative Analysis of site selection and industrial alignment to leads with focus on sectors OBD/DECD is focused on
 - Characterize leads
 - Review incentives packages and OBD's lead management process
 - Conduct interviews with existing Maine companies and out of state businesses that considered Maine, interview questions samples provided
 - Survey development
 - Compare business climate and best practices with other competing states, determined by OBD
 - Develop recommendations, compare OBD's staff/budget to other state's investment attraction teams
 2. Implementation – Work Plan
 - Included. Gantt chart, workflow narrative fairly well developed with flexibility. Work to be completed, Sept. 30th, which seems faster than expected.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Resultant

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- Indianapolis, Indiana
- Was Mike Vance's signature a real signature – doesn't look like it
- Human-centered consulting firm
- They've done work in Vermont
- Project for Indiana Economic Development Corporation – CEDS development for the State
- High-level assessment they are currently doing for the City of Indianapolis on the function of Economic Development

2. Subcontractors

- Katz, Sapper & Miller (CPA) firm
- For this project, this subcontractor will include team members with government and site selection expertise, offering a comprehensive solution tailored to your needs.
- KSM Location Advisors has assisted clients in securing \$1.4B state and local incentives, advising them on incentive programs in states
- Work seems to be incentives focused

3. Organizational Chart

- Executive Sponsor at the top; Engagement Manager below; then three at same level (senior consultant, economic development

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Resultant

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

SME, and site consultant); then a business analysis that reports to the senior consultant

- Resumes include primary backgrounds in education, workforce development, and incentives; as well as public affairs and consensus-building

4. Litigation

- N/A

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

- Integrated Delivery Approach
- Division of Labor: Resultant and KSM Collaboration (this isn't actually what division of labor means)
- Travel (two trips to Maine)
- Task 1: Review Economic Priorities
 1. Review of workforce development initiatives (this was not in the RFP and isn't a focus of this work)
- Task 2: Collect Data on Pipeline Leads
- Task 3: Analyze Site Selection Data
 1. They will clean and organize the data
 2. They will examine metrics such as frequency of site visits (not quite relevant for the way site selection works in Maine)
 3. Nice reproduction of the ven diagram from the 10-year EDS with a nice list of industries of focus (see page 5)
- Task 4: Characterize Leads
- Task 5: Review Incentive Packages
 1. Including journey mapping
- Task 6: Conduct Interviews
 1. Interviews to include small business employers in Maine that have taken advantage of incentives (NO, this isn't what we want included in this project); interviews with large

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Resultant

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

employers in Maine that have taken advantage of the incentives (NO, the RFP was clear that this is not an evaluation of our economic development incentives and that this work is already being done);

2. They did not include site selectors which is a primary interview target; we need interviews of site selectors that considered Maine as a potential location and then the decision was made not to locate in Maine; that is the whole point of this work, and this proposal misses this point.
 - Task 7: Document Review of Business
 1. They reference the September 2023 10-year EDS Progress Report, which is good
 - Task 8: Develop Recommendations
 1. To include gap analysis
2. Implementation – Work Plan
 - Gantt Chart Flexibility
 - Line Ownership – seems to be a mix of both Resultant and KSM
 - Work Plan is brief

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: OCO Consulting, LLC

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “specializes in the delivery of international trade and investment services...”
- “Analysis of leads to determine quality leads” This seems to be an ongoing task, not packaged like a service for review. Are they providing OBD a methodology to assess leads?
- “Capacity building and training sessions”
- Project One describes lead generation and sector targeting strategy
- Project two includes relevant skills and experience for this RFP; lead qualification, business climate analysis, streamline account management

2. Subcontractors

- No subcontractors

3. Organizational Chart

- 4 team members with names, jobs titles, and responsibilities

4. Litigation

- N/a

5. Certificate of Insurance

- Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: OCO Consulting, LLC

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

II. Proposed Services

1. Services to be Provided

- Very detailed, thorough plans; includes visuals to communicate process
- Proposed services show understanding of RFP purpose, expands on tasks with detailed process for completion
- Kick off
- Research phase; Lit review, consultation interviews, business climate analysis (SWOT)
- Leads analysis; collection of leads based on pipeline, analysis and characterization of leads
- Account management analysis
- Conclusions & Recommendations

2. Implementation – Work Plan

- *8 months*
- *Detailed project implementation plan*
- *Chart assigning tasks and timelines*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: OCO

DATE: 4/23/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- OCO specializes in international business consultancy with strong background in investment attraction
- Has worked with more than 400 EDOs worldwide
- Experience in leads generation, training in account management best practices
- Team has site selection experience, leads analysis, targeting leads
- Company prides itself on clear, practical strategies that are realistic to implement
- Projects: Select Philadelphia – lead generation project with focus on life sciences, pharma; Business Oregon – FDI/export strategy, including streamlining of account management; Missouri Partnership – a long-time client of OCO's who they've assisted with trade missions, promoting state businesses and investment attraction, leads generation and qualification.

2. Subcontractors

- None
- Organizational Chart: Included with small team of staff
- Litigation: None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: OCO

DATE: 4/23/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

3. Certificate of Insurance
 - Included
- II. Proposed Services
1. Services to be Provided
 - Proposals includes a technical, phased approach with outline of key industries
 - Phase I Project management
 - Phase 2 Research, review of existing tools, business climate, interviews, lead generation and management process, incentives, etc.
 - Phase 3 Leads analysis
 - Phase 4 Accounts management analysis
 - Phase 5 Final report and recommendations.
 2. Implementation – Work Plan
 - Included. Roughly 8.5-month plan with detailed timeline

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: OCO Global

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- Belfast, UK
- Specializes in international trade
- Delivered investment promotion assignments to over 400 global EDOs
- Analysis of Leads to Determine Quality leads
- Strategy for Targeting Leads that lead to landed projects, increasing OBD's success rate
- Recommendations on improvement of processes for handling leads
- Action plan and clear recommendations on how to implement the strategy
 - 1. Previous experience seems to be primarily international trade/FDI
- Previous project for Select Greater Philadelphia was quite similar to the expertise needed here: identified immediate lead opportunities & profiles, sector-specific opportunities, identified additional sector niches, and how to develop and advance these engagements into investment leads with stakeholders
- Previous project for Business Oregon is directly relevant; the study highlighted lead qualification, business climate analysis, and how to streamline account management with stakeholders
- Previous project with Missouri Partnership is relevant: We provide investment prospection in Missouri's target sectors (Advanced

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: OCO Global

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Manufacturing, Global AgTech, Logistics, Energy Solutions, Financial and Professional Solutions, Health Innovation and Food Solutions, as well as support for Missouri companies wishing to export to new International Markets.

2. Subcontractors
 - None

 3. Organizational Chart
 - Joe Phillips, Project Director at top; Abbey Merrill Project Manager, just below; then a Project Quality Assurance Manager and a Research Support person next.

 4. Litigation
 - N/A

 5. Certificate of Insurance
 - Included
- II. Proposed Services
1. Services to be Provided
 - Phase 1 – Kick-Off
 - Phase 2 – Research Phase (Literature Review, Consultation Interviews, Business Climate Analysis [good list here – Economic Environment, Regulatory Environment, Incentives, Availability of Workforce, Infrastructure & Connectivity])
 - Phase 3 – Leads Analysis
 - Collection of Leads Based on Pipeline
 - Analysis & characterization of leads
 - Phase 4 – Account Management Analysis [good flow chart on page 10]
 - Phase 5 – Final Report & Recommendations
 - Solid description of these tasks with good detail

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: OCO Global

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

2. Implementation – Work Plan

- Project Implementation
 1. Regular status calls
 2. Proactive engagement and involvement in meetings
 3. Key point of contact
 4. Quality control and assurance
 5. Up-skilling philosophy
 6. Commitment to confidentiality
- Detailed work plan table with descriptions of tasks
- Proposed Project Timeline

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Ryse Local Ventures LLC

DATE: 4/25/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- “commitment to equitable economic development”
- Previous projects establishing entrepreneurship programs, equitable lending/investment strategy; not relevant to RFP

2. Subcontractors

- None provided

3. Organizational Chart

- 4 team members listed

4. Litigation

- None

5. Certificate of Insurance

- Provided

II. Proposed Services

1. Services to be Provided

- Limited expansion from the RFP and description of the work that will be completed
- Task 1 – Review Economic Development Priorities
 - 1. “Critical review of Maine’s economic development priorities” this is outside the scope of the RFP, we are not looking to

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Ryse Local Ventures LLC

DATE: 4/25/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

revise the 10 year plan's economic development strategies
in this project.

- Task 2 – Collect Data on Pipeline Leads
 - Task 3 – Analyze Site Selection Data
 - Task 4 – Characterize Leads
 - Task 5 – Review Incentive Packages
 - Task 6 – Conduct Interviews
 - Task 7 – Document Review of Business Climate
 - Task 8 – Development Recommendations
2. Implementation – Work Plan
- *1 year*
 - *Founder/CEO listed as primary consultant for all tasks*
 - *Timeline for conducting interviews (ending April 2025) leads to quick data analysis turnaround to finish the project by May 2025*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Ryse Local Ventures

DATE: 4/24/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- RYSE is an economic justice consulting firm that works with small businesses and local organizations, usually within disadvantaged communities
- Company provides evaluation, research and strategic consulting services to support community programs and projects.
- Firm is a black, woman and LGBTQ+-owned and operated company (founded 2019). Owner a Bowdoin grad with Economics BA who has maintained strong ties to the college
- RYSE has worked on large projects, including Momentus Capital a small business development program in DC and the Justice Climate Fund (\$1 billion grant application work)
- Projects: Coastal Enterprises Inc. (CEI), -- evaluation of equitable lending and investment strategy; Higher Purpose Co. – membership experience analysis for Mississippi black business owners; U.S. Treasury Dept. – State Small Business Credit Initiative
- Projects don't show much experience in attraction of investment or lead generation for preferred industrial sectors Maine has targeted for its business attraction programs

2. Subcontractors

- None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Ryse Local Ventures

DATE: 4/24/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Organizational Chart: Included CEO to do most of the work with three other people on the team. Limited info. on their backgrounds compared to CEO's CV
- Litigation: Not included

3. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

- Review economic development priorities for OBD, including goal assessment
- Collect data on pipeline leads and capture data on new leads
- Analysis of site selection data, selectmainesites.com, assess lead generation methodology used by OBD
- Characterize leads
- Review incentives packages to measure effectiveness
- Conduct interviews with business leads/site selectors
- Review business climate
- Develop recommendations, compare OBD's staff/budget to other state's investment attraction teams

2. Implementation – Work Plan

- Included. Roughly 11-month plan shown in chart. Not much detail on tasks

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Ryse Local Ventures

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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

- Washington DC
- Economic justice consulting firm
- Skills: Research & Strategy; Interviews & Focus Groups; Project Management
- Deep commitment to equitable economic development, opportunity and social justice
- Culturally competent strategy
- Values
- Previous Experience:
 - Momentus Capital – Lead architect of the Momentus Capital Washington D.C. (headquarters) market development strategy that established the organization's first formal small business development pipeline.
 - Justice Climate Fund – Co-Lead architect of the investment strategy on a winning solicitation for a nearly \$1 billion award to the Justice Climate Fund from the U.S. Environmental Protection Agency's Greenhouse Gas Reduction Fund (GGRF) Clean Communities Investment Accelerator (CCIA).
- Previous clients:
 - CEI (Daniel Wallace); project was Evaluation of Equitable Lending and Investment Strategy

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Ryse Local Ventures

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Higher Purpose Company; Annual Higher Purpose Co. (HPC) Membership Experience Evaluation
 - US Department of Treasury: SSBCI project
 - 2. Subcontractors
 - Unclear?
 - 3. Organizational Chart
 - Kayla at the top and then “Business” and “Policy” below and then below that, Kiley, Quentin, and Shivani; it’s a bit confusing; Kiley and Shivani are Business and Quentin is Policy; there is no policy work in this RFP, so it’s unclear if this is an org chart just for this project or for the company in general
 - 4. Litigation
 - N/A
 - 5. Certificate of Insurance
 - Included
- II. Proposed Services
 - 1. Services to be Provided
 - Mostly a re-listing of what was in the RFP
 - They specify the 7 strategies of the 10-year EDS; which is not what the RFP asked them to do.
 - 2. Implementation – Work Plan
 - Work plan is just a timeline, not really a work plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Opus Consulting Partners, LLC

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “expertise in data analysis, financial and operational management, strategic planning, market analysis, risk assessment, and due diligence. Our work involves supporting companies from startup to turnaround, offering management and advisory services to enable long-term growth.”

- Projects provided did not demonstrate skills reflecting scope of RFP

2. Subcontractors

- No subcontractors

3. Organizational Chart

- 6 team members on the project

4. Litigation

- None

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

- Sticks closely to language provided in RFP, limited to no expansion from RFP language

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Opus Consulting Partners, LLC

DATE: 4/24/24

EVALUATOR NAME: Shae McGehee

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Task 1 – Review Maine’s Economic Development Priorities
 - Task 2 – Collect Data on Pipeline Leads
 - Task 3 – Analyze Site Selection Data
 - Task 4 – Characterize Leads
 - Task 5 – Review Incentive Package
 - Task 6 – Conduct Interviews
 - Task 7 – Document Review of Business Climate
 - Task 8 – Development Recommendations
2. Implementation – Work Plan
- *1 year*
 - *Itemized work plan, lists team member responsible, limited information on how the work will be completed*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Opus

DATE: 4/23/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Business consulting firm with experience in data, financial and market analysis
- Site selection experience with background in economic feasibility studies and working with governmental agencies
- Has worked with more than 100 organizations, including Maine
- Experience with most of Maine's preferred investment attraction sectors
- Projects: Future Forestry and Communities / Our Katahdin housing market and manufactured homes project; Fermway manufacturing expansion project; Spurwink M&A project
- Uncertain if firm has experience in creating investment attraction strategy or working with site selectors, which this project will require

2. Subcontractors

- None

3. Organizational Chart

- Included

4. Litigation

- None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Opus

DATE: 4/23/24

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

5. Certificate of Insurance
 - Included
-
- II. Proposed Services
 1. Services to be Provided
 - Review economic development priorities
 - Collect data on leads
 - Analysis of Site Selection website selectmainesites.com
 - Lead characterization
 - Review incentives
 - Conduct interviews and review business climate
 - Development recommendations for investment attraction strategies
 - Lacks detail or innovative methodology
 2. Implementation – Work Plan
 - Included. 12-month plan with more details than necessary about rates/costs

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Opus Consulting Partners, LLC

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Business consulting firm
 - Previous project with Northern Forest Center (Statewide Market Assessment for Affordable, Net Zero Energy Homes in Maine) – not relevant except that it was work in Maine
 - Another project to identify potential sites for business expansion
 - Another project for Spurwink to help with strategic planning (not relevant)
 2. Subcontractors
 - None
 3. Organizational Chart
 - Principal and Partner on top; then two senior consultants and a COO; then three consultants; then a sales coordinator and office manager; only certain personnel are highlighted in orange and will work on this project
 4. Litigation
 - N/A
 5. Certificate of Insurance
 - Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202402052

RFP TITLE: Investment Attraction Feedback and Strategy

BIDDER NAME: Opus Consulting Partners, LLC

DATE: 4/22/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

II. Proposed Services

1. Services to be Provided

- Review Maine's Economic Development Priorities
- Collect Data on Pipeline Leads
- Analyze Site Selection Data
- Characterize Leads
- Review Incentive Packages
- Conduct Interviews
 - This is really the only section with some good detail; the list of questions is robust
- Document Review of Business Climate
- Develop Recommendations
 - Includes multi-level SWOT (good)

2. Implementation – Work Plan

- Detailed work plan



STATE OF MAINE
DEPARTMENT OF ECONOMIC &
COMMUNITY DEVELOPMENT



Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202042052
RFP TITLE: Investment Attraction Feedback and Strategy

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

Signature

4/18/2024
Date



STATE OF MAINE
DEPARTMENT OF ECONOMIC &
COMMUNITY DEVELOPMENT

MAINE.
ECONOMIC & COMMUNITY
DEVELOPMENT

Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202042052
RFP TITLE: Investment Attraction Feedback and Strategy

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

4/17/24

Date



STATE OF MAINE
DEPARTMENT OF ECONOMIC &
COMMUNITY DEVELOPMENT



Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202042052
RFP TITLE: Investment Attraction Feedback and Strategy

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

Charlotte R. Mace

Signature

4/17/24

Date