

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

RFP 202406117			
Planning and Coordination of the Statewide Infectious Disease Conference			
Bidder Name:		Green Tree Consultants, LLC	Healthcentric Advisors
Proposed Cost:		\$233,449.20	\$74,000.00
Scoring Sections	Points Available		
Section I: Preliminary Information	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	25.00	20.00	5.00
Section III: Proposed Services	40.00	40.00	15.00
Section IV: Cost Proposal	35.00	11.09	35.00
<b>TOTAL</b>	<b><u>100.00</u></b>	<b><u>71.09</u></b>	<b><u>55.00</u></b>

Janet T. Mills  
Governor

Sara Gagné-Holmes  
Acting Commissioner



Maine Department of Health and Human Services  
Division of Contract Management  
11 State House Station  
109 Capitol Street  
Augusta, Maine 04333-0011  
Tel.: (207) 287-3707; Fax: (207) 287-5031  
TTY: Dial 711 (Maine Relay)

## **Award Justification Statement RFP# 202406117**

### **Planning and Coordination for the Statewide Infectious Disease Conference**

#### **I. Summary**

Through RFP# 202406117 Planning and Coordination for the Statewide Infectious Disease Conference, the Department sought proposals for planning, coordination, and execution of an Infectious Disease Conference to be held May 2025, in Portland, Maine for approximately three to four hundred (300-400) participants. Two (2) Bidders responded to the RFP:

Green Tree Event Consultants, LLC  
Healthcentric Advisors

Through the evaluation process, Green Tree Event Consultants, LLC received the highest score and was determined to provide the best value to the State of Maine.

#### **II. Evaluation Process**

An Evaluation Team, composed of four (4) State employees, applied the consensus method in scoring the Bidders' Qualifications & Experience and Proposed Services. Scores for the Cost Proposals were assigned using a mathematical formula.

#### **III. Qualifications & Experience of Conditional Awardee**

Green Tree Event Consultants, LLC offered an accomplished, experience-laden portfolio demonstrating the ability to deliver Planning and Coordination for the Statewide Infectious Disease Conference and successfully perform under the prospective contract.

#### **IV. Proposed Services by Conditional Awardee**

Green Tree Event Consultants, LLC provided a well-rounded response outlining an understanding of, and ability to meet, programmatic requirements of the RFP. Additionally, Green Tree Event Consultants, LLC demonstrated the means and skills necessary to meet the RFP's performance requirements through its project teams' competencies, subject matter expertise, and background.

#### **V. Cost Proposal**

Green Tree Event Consultants, LLC provided a cost of \$233,449.20.

#### **VI. Conclusion**

Out of 100 possible points, the Evaluation Team awarded Green Tree Event Consultants, LLC a score of 71.09. The strength of Green Tree Event Consultants, LLC's proposal outweighed the other Bidder through its qualifications and experience and the services and cost it proposed. The Evaluation Team determined that the proposal submitted by Green Tree Event Consultants, LLC represents the best value to the State of Maine.

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TTY: Dial 711 (Maine Relay)

Sep-12-2024

Via Electronic Mail: [whitney@greentreeevents.com](mailto:whitney@greentreeevents.com)

Green Tree Event Consultants, LLC  
Whitney Burdsall, Logistics Director  
35 Storer Street  
Saco, ME 04072

SUBJECT: Notice of Conditional Contract Award under RFP #202406117 Planning and Coordination for the Statewide Infectious Disease Conference

Dear Whitney Burdsall,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

- Green Tree Event Consultants, LLC

Green Tree Event Consultants, LLC received the evaluation team's highest ranking. The Department will be contacting Green Tree Event Consultants, LLC 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 Green Tree Event Consultants, LLC. Green Tree Event Consultants, LLC 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.

Any person aggrieved by this 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).

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

Sincerely,

Signed by:

*Veronica Smith*

9164A2DFB925446...

Veronica Smith

Chief Operating Officer

Maine Center for Disease Control and Prevention

DocuSigned by:

*Debra Downer*

5DC6307B8558482...

Debra Downer

Deputy Director for Competitive Procurement

Division of Contract Management

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Sep-12-2024

Via Electronic Mail: [kbutler@healthcentricadvisors.org](mailto:kbutler@healthcentricadvisors.org)

Healthcentric Advisors  
Kara Butler, MBA, MHSA, CHRO & Director of Administrative Services  
235 Promenade Street, Suite 500  
Providence, RI 02908

SUBJECT: Notice of Conditional Contract Award under RFP #202406117 Planning and Coordination for the Statewide Infectious Disease Conference

Dear Kara Butler,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Maine Center for Disease Control and Prevention. 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:

- Green Tree Event Consultants, LLC

Green Tree Event Consultants, LLC received the evaluation team's highest ranking. The Department will be contacting Green Tree Event Consultants, LLC 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 Green Tree Event Consultants, LLC. Green Tree Event Consultants, LLC 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).

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

Sincerely,

Signed by:

*Veronica Smith*

9164A2DFB925446...

Veronica Smith

Chief Operating Officer

Maine Center for Disease Control and Prevention

DocuSigned by:

*Debra Downer*

5DC6307B8558482...

Debra Downer

Deputy Director for Competitive Procurement

Division of Contract Management

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Green Tree Event Consultants, LLC

**DATE:** September 4, 2024

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**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Brittany Hall

**Names of Evaluators:** Jessica Shiminski, Caitlin Anton, Amanda Luciano, and Miranda Whalen

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<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	<b>N/A</b>
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>25.00</b>	<b>20.00</b>
Section III. Proposed Services	<b>40.00</b>	<b>40.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>11.09</b>
<u><b>Total Points</b></u>	<u><b>100.00</b></u>	<u><b>71.09</b></u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Green Tree Event Consultants, LLC

**DATE:** September 4, 2024

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**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

N/A



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Green Tree Event Consultants, LLC

**DATE:** September 4, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>25.00</b>	<b>20.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Provided three (3) project examples, one (1) example was a large-scale conference (&gt;500 attendees) held in the State of Maine.</li><li>• Created in 2001 with projects throughout New England and nationally.</li><li>• Demonstrated conference planning experience with state government agencies.</li><li>• Team organization has over 100 years of combined event experience.</li><li>• The Department has had a positive experience working with this organization during the planning and implementation phase of the OADS Innovations Summit.</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Two (2) subcontractors listed for A/V services.</li></ul>
<b>3. Litigation</b>
<ul style="list-style-type: none"><li>• None</li></ul>
<b>4. Financial Viability</b>
<ul style="list-style-type: none"><li>• Provided relevant financial documentation.</li></ul>
<b>5. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided a valid certificate of insurance.</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

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**BIDDER:** Green Tree Event Consultants, LLC

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**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40.00</b>	<b>40.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Plans to manage meeting schedule.</li><li>• Plans to meet every two (2) weeks for one (1) hour with increased frequency in the final two (2) months before the event.</li><li>• Plans to provide a master schedule with timeline through a Cloud-based file sharing program for real time review with the Planning Group.</li><li>• Plans to provide a meeting agenda 24-36 hours prior to scheduled meeting date.</li><li>• Plans to provide a meeting minutes 24-36 hours after meeting date.</li><li>• The Managing partner, VP of Sales, Logistics Director, and the Marketing and Event Coordinator will all be assigned to the project for maximum expertise and support.</li><li>• Plans to utilize established systems, processes, tools, and templates in place to support efficiency.</li><li>• Plans to host a kickoff meeting with the Planning Group to identify priorities.</li><li>• Plans to conduct a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis.</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• Offers in-house graphic design but can also work with contractors or preferred vendors.</li><li>• Dissemination includes mailing/email lists, "PR", social media and website.</li><li>• Plans to provide support within 24 hours.</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Demonstrated the ability to design and manage websites for the event.</li><li>• Will ensure all state policies are followed.</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>• Demonstrated ability to secure appropriate speakers for event.</li><li>• Plans to follow a speaker stewardship process (coordinating needs to involve speakers/presenters).</li></ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

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**E. Conference Exhibits and Poster Displays**

- Vice President of sales & business development will work to identify candidates and secure proper exhibitors.
- Online registration system will include online payments, invoicing, registration emails and support services.

**F. Event Planning and Scheduling**

- Plans to create a day-of script and timeline with details for event, including location and agenda.
- Plans to provide logistical support prior to, during and through event closing.
- Subcontractors will supply and provide technical assistance for audiovisual equipment and other technology supplies and equipment.

**G. Participant Registration**

- Plans to build an online registration platform to service all customer inquiries, communications and payments.

**H. Material Preparation and Distribution**

- All provided materials will be stored through an online sharing system.

**I. Continuing Education Credits**

- Plan to work with Planning Group to make sure everything is likely to be approved and available.
- Will include all information on CEUs on all promotional materials, registration site and website, as well as participant communications.
- Plans to identify and provide CEUs as needed based off accrediting requests.

**J. Educational Workshop Evaluations**

- Surveys will be drafted prior to the event and distributed to attendees' post-event within 24-48 hours with reminder emails.
- A summary of survey results will be provided within 30 days post-event.
- All participant info will be collected for CE credit.
- Plans to provide an option for purchase orders.
- Attendance will be tracked, and credit certificates will be distributed.
- Financial reconciliation will be provided within 30 days of event.
- Full and final financial reconciliation will be provided within 60 days.

**K. General Conference Support**

- Plans to utilize the subcontractor for the venue's audio/visual and technical assistance.
- Plans to send three (3) email communications sent to participant's pre-event:
  - Registration confirmation with details.
  - Participant reminder email 3-4 weeks prior to event – instructions for "what to do when you arrive".
  - Final detailed reminder with all of the above included.
- Support is provided to all participants via phone/email and event website.
- Plans to send four (4) email confirmations speakers' pre-event:
  - Intro/confirmation email with details of event.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

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**DATE:** September 4, 2024

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- Registration confirmation, including next steps instructions.
- Speaker reminder email 3-4 weeks prior to event, recap and what to do when you arrive.
- Final details reminder with all the above details included.
- Speaker support provided via phone and email.
- Plan to send four (4) exhibitor communications including intro and next steps, registration confirmation, reminder email, and final details email.

- Will provide an initial walk-through then a complete walk-through at four (4) weeks pre-event. The detailed walk-through will be done with a complete detail on room set up, transitions, audiovisual needs, food and drink, and other set up needs.

**L. Deliverables**

- Recommended an accelerated schedule for planning due dates such as confirming the venue reservation sooner in the event planning.

**M. Reports**

- Met the requirements.

**2. Staffing**

- Four (4) staff members provided, each with own expertise to the event:
  - Two (2) project leads (one (1) managing partner, one (1) logistics director).
  - One (1) business development and sales.
  - One (1) marketing and event coordinator.
- Provided a detailed staffing plan.

**3. Implementation - Work Plan**

- Provided a thorough and realistic work plan.

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

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**BIDDER:** Green Tree Event Consultants, LLC

**DATE:** September 4, 2024

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**EVALUATION OF SECTION IV  
Cost Proposal**

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$74,000.00</b>	÷	<b>\$233,449.20</b>	x	<b>35.00 points</b>	=	<b>11.09</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Healthcentrics Advisors

**DATE:** September 4, 2024

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**SUMMARY PAGE**

**Department Name:** Health and Human Services

**Name of RFP Coordinator:** Brittany Hall

**Names of Evaluators:** Jessica Shiminski, Caitlin Anton, Amanda Luciano, and Miranda Whalen

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<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	<b>N/A</b>	<b>N/A</b>
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>25.00</b>	<b>5.00</b>
Section III. Proposed Services	<b>40.00</b>	<b>15.00</b>
Section IV. Cost Proposal	<b>35.00</b>	<b>35.00</b>
<u><b>Total Points</b></u>	<u><b>100.00</b></u>	<u><b>55.00</b></u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Healthcentrics Advisors

**DATE:** September 4, 2024

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**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

N/A

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Healthcentrics Advisors

**DATE:** September 4, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>25.00</b>	<b>5.00</b>

**Evaluation Team Comments:**

<b>Part IV. Section II. Organizational Qualification and Experience</b>
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Provided three (3) project examples; none of the project examples were relevant to the scope of the RFP.</li><li>• Nationally recognized nonprofit organization for twenty (20) years.</li><li>• Cited partnerships with federal and local government agencies but did not provide details.</li><li>• Cited subject matter experts in infection prevention, education, project management, and coalition building/event planning.</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Did not address if subcontractors would be used.</li></ul>
<b>3. Litigation</b>
<ul style="list-style-type: none"><li>• None</li></ul>
<b>4. Financial Viability</b>
<ul style="list-style-type: none"><li>• In attachment #4, the Bidder stated the required financial statements were included in three (3) separate PDF file attachments in Submission File #2 which was not included in the email. The Department verified the documentation in the email was not included with the Bidder's proposal.</li></ul>
<b>5. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Provided a valid certificate of insurance.</li></ul>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Healthcentrics Advisors

**DATE:** September 4, 2024

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**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>40.00</b>	<b>15.00</b>

**Evaluation Team Comments:**

<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Plans to create a project timeline.</li><li>• Will provide meeting minutes to keep everyone informed, including action items and deadlines within five (5) business days.</li><li>• Provides a multidisciplinary team with experience in healthcare quality improvement and event management.</li><li>• Plans to utilize Subject Matter experts to tailor the content towards local needs and priorities.</li><li>• Cites a deep healthcare expertise with strong communication capabilities.</li><li>• Did not specifically address any collaboration with the Planning Group.</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• Plans to use digital promotion – email, brochure, website, social media.</li><li>• Did not provide details on how bulk and limited first-class mailing or additional distribution of material tasks will be accomplished and how they will ensure desired outcomes are achieved.</li><li>• Plans to use in-house resources for initiating and facilitating mass mailings.</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Did not address the website design or any of the content (agenda, Continuing Education Credits, speakers/presenters, etc.) in this section.</li><li>• Will meet the State's MaineIT policies.</li><li>• Plans to use Cvent event management software platform for the website and mobile app.</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>• Did not address the plan to identify, solicit, and contract conference speakers/presenters.</li><li>• Acknowledges the commitment to meet the eight (8) week deadline.</li></ul>
<b>E. Conference Exhibits and Poster Displays</b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

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**DATE:** September 4, 2024

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<ul style="list-style-type: none"> <li>Did not detail the plan to negotiate, receive, process, and account for exhibitor event fees.</li> </ul>
<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"> <li>Met the requirements.</li> </ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"> <li>Plans to utilize Cvent event management software platform.</li> <li>Met the requirements.</li> </ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"> <li>Did not address the creation and utilization of a QR Code scanning system.</li> <li>Cvent software used to offer Attendee Hub Mobile App.</li> <li>Provides conference event info, agenda, speaker/presenter info etc.</li> <li>The Cvent App will provide all information needed for the conference at everyone's fingertips.</li> <li>Did not provide a contingency plan for Participants who could not download the app.</li> </ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"> <li>Met the requirements.</li> </ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"> <li>Did not provide detailed descriptions of each requirement in this section.</li> </ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"> <li>Response to deliver all conference-related materials and supplies was minimally responsive.</li> <li>Response to providing a complete walk-through/presentation of the site was minimally responsive.</li> <li>Plans to staff a Conference administration office providing a resource for speakers, presenters, sponsors, exhibitors and vendors to manage issues or technical difficulties.</li> </ul>
<b>L. Deliverables</b>
<ul style="list-style-type: none"> <li>Met the requirements.</li> </ul>
<b>M. Reports</b>
<ul style="list-style-type: none"> <li>Met the requirements.</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>Met the requirements.</li> </ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"> <li>Met the requirements.</li> </ul>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Coordination and Planning of the Statewide Infectious Disease Conference

**BIDDER:** Healthcentrics Advisors

**DATE:** September 4, 2024

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**EVALUATION OF SECTION IV  
Cost Proposal**

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Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$74,000.00</b>	÷	<b>\$74,000.00</b>	x	<b>35.00 points</b>	=	<b>35.00</b>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Planning and Coordination for the Statewide Infectious Disease Conference

**BIDDER NAME:** Green Tree Event Consultants, LLC

**DATE:** August 19, 2024

**EVALUATOR NAME:** Caitlin Anton

**EVALUATOR DEPARTMENT:** DHHS/Division of Disease Surveillance

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**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 Facilitator for this RFP.*

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• In business for 25 years</li><li>• Family owned with over 100 years of combined experience</li><li>• Have worked with many small businesses in New England, as well as state government</li><li>• Repeat customers</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• AV Technik, LLC</li><li>• Headlight Audio Visual, Inc.</li></ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"><li>• Staffing plan included</li><li>• Each staff member includes their job description, strengths and qualifications as well as the percentage of total project time they will be supporting.</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Details provided on profit and loss</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Included</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Planning and Coordination for the Statewide Infectious Disease Conference

**BIDDER NAME:** Green Tree Event Consultants, LLC

**DATE:** August 19, 2024

**EVALUATOR NAME:** Caitlin Anton

**EVALUATOR DEPARTMENT:** DHHS/Division of Disease Surveillance

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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Will schedule regular virtual meetings via Zoom, Teams, etc.</li><li>• Meeting invite will be sent out 10 days prior to meeting date</li><li>• Frequency – every 2 weeks, for one hour, 6-8 month from event date, more frequently in the final two months.</li><li>• Meetings can be adjusted as needed.</li></ul>
<ul style="list-style-type: none"><li>• Timeline included with milestones, deadline and review meetings</li><li>• Schedule will be available via cloud based file sharing.</li></ul>
<ul style="list-style-type: none"><li>• Event manager's report, meeting agenda action items/tasks, and timeline will be provided 24-36 hours prior to meeting.</li></ul>
<ul style="list-style-type: none"><li>• Meeting notes and action items/tasks will be provided 24-36 hours prior to meeting.</li></ul>
<ul style="list-style-type: none"><li>• The Managing partner, VP of Sales, Logistics Director, and the Marketing and Event Coordinator will all be included.</li></ul>
<ul style="list-style-type: none"><li>• Kick-off meeting is scheduled to learn more about the event and talk about goals.</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• a. Offers in-house graphic design but can also work with contractors or preferred vendors.</li><li>• b. Dissemination includes mailing/email lists, PR, social media and website.</li></ul>
<ul style="list-style-type: none"><li>• Electronic based marketing, printed mailings and promotional materials will be included.</li></ul>
<ul style="list-style-type: none"><li>• Can assist with mass mailings in house</li><li>• Can also work with online and direct mail vendors</li></ul>
<ul style="list-style-type: none"><li>• Yes – they will respond within 24-36 hours.</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Has designed and managed many websites for state of Maine events</li><li>• All state policies are followed</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>• Can help with topics and speakers</li><li>• Will create call for proposals, speaker evals, and contract negotiation.</li><li>• Once speaker is confirmed, they work through a speaker stewardship process</li><li>• All travel arrangements and reimbursements are coordinated</li></ul>

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<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"><li>• Can identify candidates</li><li>• Online registration system available</li><li>• Includes online payments, invoicing, registration emails and support services</li></ul>
<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"><li>• Day-of script</li><li>• Timeline (assignments, locations, content)</li><li>• Support provided to stakeholders</li></ul>
<ul style="list-style-type: none"><li>• Pass</li></ul>
<ul style="list-style-type: none"><li>• Subcontractors will be used for this</li></ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"><li>• Will build an online registration platform</li><li>• Service all customer inquiries, communications and payments</li></ul>
<ul style="list-style-type: none"><li>• Yes, they adhere to all accommodation requests</li><li>• Will handle special services or accommodations directly</li></ul>
<ul style="list-style-type: none"><li>• All accommodations and transportation will be managed through them, including registration services.</li><li>• Direct contact info will be available and response to inquiries will be done within 24 hours.</li></ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"><li>• All conference materials are designed by them</li><li>• QR code included.</li></ul>
<ul style="list-style-type: none"><li>• Yes, they will consult with the speakers/presenters to obtain all of these materials for the QR code.</li></ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"><li>• They will work with planning group to make sure everything is likely to be approved and available.</li><li>• They will include all info on CEUs in all promotional materials, registration site and website, as well as participant communications.</li></ul>
<ul style="list-style-type: none"><li>• Timelines and deadlines are working into the master planning timeline, taking into account feedback from the planning group.</li></ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"><li>• Surveys are drafted prior to the event and handed out post-event within 24-48 hours.</li><li>• Survey is sent out, with reminder emails and summary of survey results provided within 30 days post-event.</li></ul>

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<ul style="list-style-type: none"><li>• All participant info is collected for CE credits</li><li>• They will provide an option for purchase orders</li><li>• Attendance is tracked and credit certificates are distributed</li><li>• Financial reconciliation is provided within 30 days of event. Full and final financial reconciliation provided within 60 days.</li></ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"><li>• Audio/visual subcontractors will be used for technical assistance for equipment</li></ul>
<ul style="list-style-type: none"><li>• They will manage all arrangements with the venue.</li></ul>
<ul style="list-style-type: none"><li>• They send 3 participant communications pre-event regarding registration confirmation, email reminder, and final details.</li></ul>
<ul style="list-style-type: none"><li>• They send 4 speaker/presenter communications pre-event including intro and next steps, registration confirmation, reminder email and final details email.</li></ul>
<ul style="list-style-type: none"><li>• They send 4 exhibitor communications including intro and next steps, registration confirmation, reminder email, and final details email.</li></ul>
<ul style="list-style-type: none"><li>• They coordinate the design, ordering and distribution on the awards.</li></ul>
<ul style="list-style-type: none"><li>• They will produce name tags and information packets pre-event and onsite</li><li>• They will use a signage map so signs are placed in the appropriate locations</li></ul>
<ul style="list-style-type: none"><li>• All conference related materials and supplies are delivered.</li></ul>
<ul style="list-style-type: none"><li>• An initial walkthrough is provided</li><li>• At 4 weeks pre-event, a detailed walkthrough is done with complete detail on room set up, transitions, audiovisual needs, food and drink, and other set up needs.</li></ul>
<ul style="list-style-type: none"><li>• Onsite support is provided</li></ul>
<ul style="list-style-type: none"><li>• Speakers are greeted and one person is assigned to provide technical support and make sure CEU requirements are met.</li></ul>
<ul style="list-style-type: none"><li>• Subcontractors will provide all back up equipment for audiovisual equipment.</li></ul>
<ul style="list-style-type: none"><li>• There will be an onsite exhibitor services desk to provide support.</li></ul>
<ul style="list-style-type: none"><li>• "Need help" contact info is provided in all communications that go out, as well as on the website and registration sites.</li><li>• Registration/information desk provided onsite during event.</li></ul>
<ul style="list-style-type: none"><li>• They will administer and collect CE documents.</li></ul>
<ul style="list-style-type: none"><li>• Mobile or web-based check in systems can be provided. Mobile app tools may also be used.</li></ul>
<ul style="list-style-type: none"><li>• This is all done by them</li></ul>
<ul style="list-style-type: none"><li>• They will manage all post-event cleanup</li></ul>
<b>L. Deliverables</b>

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<ul style="list-style-type: none"><li>• Able to accommodate what we need and will actually be able to execute these items earlier than what we asked for.</li></ul>
<b>M. Reports</b>
<ul style="list-style-type: none"><li>• Will be able to accommodate what we need.</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Met requirements</li></ul>
<ul style="list-style-type: none"><li>• Met requirements</li></ul>
<ul style="list-style-type: none"><li>• Met requirements</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Provided and able to accommodate our needs and within the appropriate time.</li></ul>
<b>Part IV, Section IV. Cost Proposal</b>



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**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 Facilitator for this RFP.*

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Ability to provide all logistical needs</li><li>• Has worked with DHHS/MeCDC in the past to provide events</li><li>• Provides all staffing for event to manage any inquires/needs</li><li>• Over 25yrs of experience</li><li>• Utilizes Maine businesses when planning events</li><li>• Offers CE/CEU's</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Audio-visual only (2 listed)</li><li>• Has worked with them in past with multiple events, including DHHS/MeCDC event without failure]</li><li>• Multiple options to provide successful</li></ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"><li>• Timeline provides anticipated dates for completion of assigned task</li><li>• Detailed outline of events and when it needs to take place</li><li>• Multiple staffing assigned to each project/section of event</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None identified</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Provides updates to any changes</li><li>• Stays within budget</li><li>• Confirms all financial responsibility with planning group</li><li>• Provided financial report (profit &amp; loss)</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Liability insurance provided</li></ul>

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Part IV, Section III Proposed Services
1. Services to be Provided
Part II
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>Establish regular virtual meetings and send invites according to meeting dates.</li><li>Planned meetings every 2weeks, 6-8months prior to event. Increasing as needed</li></ul>
<ul style="list-style-type: none"><li>Integrate master schedule/timeline, making available to all included in planning group</li></ul>
<ul style="list-style-type: none"><li>Agenda provided 24-36hrs prior to meeting dates</li></ul>
<ul style="list-style-type: none"><li>Provide detailed meeting notes prior to meeting date</li></ul>
<ul style="list-style-type: none"><li>Team assigned based on expertise. Ensure all processes are in place to meet planning needs.</li></ul>
<ul style="list-style-type: none"><li>Host kick off meeting, get to know the group.</li><li>Allow time to learn about the event's purpose. Where expertise is needed the most. Identify priorities.</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>Determine promotional material needs and where/how they will be distributed.</li><li>In house graphic design expertise available</li></ul>
<ul style="list-style-type: none"><li>Distribute promotional materials based off approvals</li></ul>
<ul style="list-style-type: none"><li>Ability to complete mass mailings/distribution of promotional materials for event.</li><li>Looking for most effective and cost efficient based on needs</li></ul>
<ul style="list-style-type: none"><li>Provide and respond to all inquires regarding the event within 24-36hrs at max, mostly within a few hours.</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>Managed three events for the State of Maine in the past, able to follow state polices/security etc.. familiar with privacy/data etc..</li><li>Designed and managed website events. All with prior approval</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>Experienced in call for proposals and contract negotiation for securing appropriate speakers for event</li><li>Follows speaker stewardship process (coordinating needs to involve speakers/presenters)</li></ul>

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<ul style="list-style-type: none"><li>• Coordinates all travel needs and reimbursement for event as well as for the speakers attending</li><li>• Recommends confirming speaker fee/reimbursement amounts prior to to track expenses to stay on budget.</li></ul>
<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"><li>• VP of sales &amp; business development will work to secure and direct proper exhibitors</li></ul>
<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"><li>• Create a day-of script and timeline with details for event, including location and agenda</li><li>• Provides best practices on event flow, balancing and engaging the audience</li><li>• Provides logistical support prior to, during and through event closing</li></ul>
<ul style="list-style-type: none"><li>• Follow and abide by ADA specifications regarding smoke-free environment.</li></ul>
<ul style="list-style-type: none"><li>• Ability to provide Maine based- audiovisual company and manage AV set-up</li><li>• AV team includes “Headlight Audiovisual” (Portland) and “AV Technik” (Scarborough), willing to explore other services to meet the planning needs</li></ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"><li>• Ability to oversee participant registration</li><li>• Manage website, registration, financial options, email confirmations, able to embed within existing department website</li><li>• Will follow up with all customers inquires</li><li>• Complete any onsite registration and or registration updates/changes</li><li>• Provides all necessary materials and equipment. (name badge, welcome packets, needed materials, and any other needs and or equipment.</li></ul>
<ul style="list-style-type: none"><li>• If contracted event – provide discounted lodging rate with special booking link. Provided in participant communication</li><li>• If not contracted at hotel – arrangements provided to reserved block at nearby hotel, with price point options.</li><li>• Will manage request or accommodation needs directly with participants and lodging</li></ul>
<ul style="list-style-type: none"><li>• Registration services include managing all accommodations and transportation through registration system</li><li>• Direct contact information will be provided to participants</li><li>• support provided to participants, response to inquiries within 24hrs</li></ul>
<b>H. Material Preparation and Distribution</b>

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<ul style="list-style-type: none"> <li>• Conference materials designed and produced based on planning group approval</li> <li>• Can design multi-page books, digital event app, QR codes.</li> <li>• Familiar with programs to create easy access for participants</li> </ul>
<ul style="list-style-type: none"> <li>• Gathers needed materials for speakers/presenters</li> <li>• Materials are provided in a online file sharing system so members of the planning group can access as needed.</li> <li>• Tracking sheet provided for speakers/presenters to ensure all items are received prior to event date</li> </ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"> <li>• Will identify and provide needed CEUs as needed based off accrediting requests</li> </ul>
<ul style="list-style-type: none"> <li>• Timelines/deadlines created and followed to ensure planning is being followed</li> </ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"> <li>• Participate feedback is best within 24-48hrs of the event. Surveys are immediately sent out post-event</li> <li>• Survey sent out with reminders to those who didn't complete</li> <li>• Summarization of results are provided to the planning group within 30days of event</li> <li>• For participates needing to pay with check, manages all invoicing, offline payments</li> <li>• Will submit request for accrediting bodies for CEU</li> <li>• Will distribute credit certifications and instruction as appropriate</li> <li>• A preliminary financial reconciliation will be provided within 30days of the event</li> <li>• Full statement provided within 60days of event.</li> </ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"> <li>• Provide audio-visual and or subcontract if needed to accommodate all speakers/presenters.</li> <li>• Editing of videos takes up to 7-21 days</li> </ul>
<ul style="list-style-type: none"> <li>• Manage all arrangements on venue behalf</li> <li>• Will advise best options for space, food, timing</li> <li>• Conduct audit of the event, coordinating any adjustments or special request</li> </ul>
<ul style="list-style-type: none"> <li>• 3 Email communications sent to participant's pre-event               <ul style="list-style-type: none"> <li>○ 1. Registration confirmation with details</li> <li>○ 2. Participant reminder email 3-4weeks prior to event – instructions for "what to do when you arrive"</li> <li>○ 3. Final detailed reminder with all of the above included</li> </ul> </li> </ul>

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<ul style="list-style-type: none"><li>• Support is provided to all participants via phone/email and event website</li></ul>
<ul style="list-style-type: none"><li>• 4 email confirmations sent to speakers' pre-event<ul style="list-style-type: none"><li>○ 1. Intro/confirmation email with details of event</li><li>○ 2. Registration confirmation, including next steps instructions</li><li>○ 3. Speaker reminder email 3-4 wks prior to event, recap and what to do when you arrive.</li><li>○ 4. Final details reminder with all the above details included</li></ul></li><li>• Speaker support provided via phone and email</li></ul>
<ul style="list-style-type: none"><li>• Send 4 exhibitor communications pre-event<ul style="list-style-type: none"><li>○ 1. Intro and next steps, details of event and layout</li><li>○ 2. Registration confirmation, receipts, next steps</li><li>○ 3. Exhibitor reminder email 3-4 weeks prior to event, includes full event details and what to do when you arrive</li><li>○ 4. Exhibitor final details 3days prior to, include recap and all details</li></ul></li></ul>
<ul style="list-style-type: none"><li>• Coordinate design, procurement, and distribution of promotional items.</li><li>• Work to get best quality budget allows</li></ul>
<ul style="list-style-type: none"><li>• Able to make name tags, information packets, and info desk for participants.</li><li>• Able to provide event signage</li><li>• Having staffing available during transition times to provide direction to attendees</li></ul>
<ul style="list-style-type: none"><li>• Manage receiving of all materials/supplies</li><li>• Will transport items to conference, setting up and breakdown</li></ul>
<ul style="list-style-type: none"><li>• Provides initial work through with planning group</li><li>• Presents floor plan and venue usage</li><li>• 4weeks prior to event, a detailed run of show is provided, full review of event</li><li>• Assigned team is available onsite during the full conference – first in, last out</li></ul>
<ul style="list-style-type: none"><li>• Sets up and manages on site registration and information for duration of event.</li></ul>
<ul style="list-style-type: none"><li>• Will greet speakers and provide nametags, packets, venue map, agenda</li><li>• Speakers have technical support and staff member available to help</li><li>• Provides CEU credits</li></ul>
<ul style="list-style-type: none"><li>• Ensure all back up all audiovisual services have back up equipment.</li><li>• Past experience working with Headlight AV and AV Technik with no reported issues</li></ul>
<ul style="list-style-type: none"><li>• Provides onsite exhibitor services desk to provide support and answer questions/requests.</li><li>• ID signs set for event for easy navigating</li></ul>

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<ul style="list-style-type: none"><li>• “need help” contact info is provided in all communications, on website and registration.</li><li>• Team staff provided at information desk for duration of event and as needed.</li></ul>
<ul style="list-style-type: none"><li>• Will administrator and collect any documentation for continuing education organizations.</li><li>• Methods vary based off planning group preference/style</li></ul>
<ul style="list-style-type: none"><li>• Ability to use mobile or web-based check-in</li><li>• Recommends specific apps to make process easy for participants.</li></ul>
<ul style="list-style-type: none"><li>• Produce and deliver certifications of completion to appropriate participants</li></ul>
<ul style="list-style-type: none"><li>• Manages all on-site post event clean up</li><li>• Packs up and distributes any remaining conference materials to appropriate channels.</li></ul>
<b>L. Deliverables</b>
<ul style="list-style-type: none"><li>• Provides complete planning timeline to group, updated dates provided based on the above details and adjusted timeline. Will start asap to secure venue (September timeline).</li></ul>
<b>M. Reports</b>
Table 2: <ul style="list-style-type: none"><li>• A. provides agenda and planning timeline 24-36 hrs prior to meeting. Post meeting minutes sent within 48hrs of meeting providing details</li><li>• B. post-conference survey sent out via email within 24hrs of event ending. Results provided and summary of results. Survey results available 7-10 business days post event.</li><li>• C. provides event managers summary, including survey results, financial and recommended next steps</li><li>• D. provides regular financial updates on the budget throughout planning.<ul style="list-style-type: none"><li>○ Prelim provided within 30days and final within 60days.</li></ul></li></ul> Table 3: <ul style="list-style-type: none"><li>• A. pre-meeting agendas sent 24hrs prior to meeting, post meeting notes sent within 48hrs of meeting</li><li>• B. provides full report of survey feedback within 7-10 days post event</li><li>• C. provides event manager summary</li><li>• D. provides prelim of financial statement 30days post event and final within 60days</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• 4 staff members provided, each with own expertise to the event</li></ul>

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<ul style="list-style-type: none"><li>• 2 project lead (1 managing partner, 1 logistics director). 1 business development and sales. 1 marketing and event coordinator.</li></ul>
<ul style="list-style-type: none"><li>• Anticipating any audio-visual subcontractor may be needed based on capabilities</li><li>• Partnered with two of Maine's leading audio-visual service providers.</li><li>• Fee's for subcontractors will be included with no markup</li></ul>
<ul style="list-style-type: none"><li>• 2 staff members will lead the project, 2 others will provide key support</li><li>• Positions of each staff member broken down by category and responsibility</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Implementation and work plan outlined with staff responsible for each task, includes timeline</li></ul>

<b>Part IV, Section IV. Cost Proposal</b>
<ul style="list-style-type: none"><li>• </li></ul>

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**DATE:** 8/27/2024

**EVALUATOR NAME:** Jessica Shiminski

**EVALUATOR DEPARTMENT:** DHHS CDC

\*\*\*\*\*

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• 100yrs combined event experience</li><li>• Maine Small Business Development Center</li><li>• Maine Office of Tourism annual conference</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Included – two AV companies in Cumberland County</li></ul>	
<b>3. Organizational Chart</b>	
<ul style="list-style-type: none"><li>• No chart, but staffing plan is thorough</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• none</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• included</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• included</li></ul>	



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202406117

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**EVALUATOR NAME:** Jessica Shiminski

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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Teams, Zoom or preferred platform</li><li>• 10 days calendar invite, adjusted if necessary</li><li>• Meeting frequency – every two weeks with increase prior to event</li></ul>
<ul style="list-style-type: none"><li>• Master schedule/timeline regularly reviewed with team</li><li>• Cloud based file sharing</li><li>• agendas</li></ul>
<ul style="list-style-type: none"><li>• Report, agenda, action item list provided 24-36hrs in advance to meetings</li></ul>
<ul style="list-style-type: none"><li>• 24-36hrs in advance</li></ul>
<ul style="list-style-type: none"><li>• Assignment list of staff</li><li>• Established systems, processes in place to support efficiency</li></ul>
<ul style="list-style-type: none"><li>• Kick-off meeting with swot analysis</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• In house graphic design</li><li>• Utilize existing mailing lists and work to identify additional distribution channels</li><li>• Based on direction and approved budget</li></ul>
<ul style="list-style-type: none"><li>• Direct mail vendors</li></ul>
<ul style="list-style-type: none"><li>• Response to participants 24-36hrs maximum</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Previously designed and managed multiple websites for State of Maine events</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>• Experience with speaker evaluation criteria and contract negotiation</li><li>• Speaker stewardship process included and thorough</li><li>• Coordinate travel and reimbursements</li></ul>
<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"><li>• Review historical info</li><li>• Direct sales</li><li>• Poster/exhibitor registration system</li><li>• Stewardship ensuring deliverables</li></ul>
<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"><li>• Comprehensive day of script and logistical timeline</li><li>• Addressed thoroughly</li><li>• Subcontract with Maine AV company</li></ul>

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<b>G. Participant Registration</b>
<ul style="list-style-type: none"><li>• Build and maintain custom registration platform</li><li>• Badges, welcome packs, other event materials</li></ul>
<ul style="list-style-type: none"><li>• addressed</li></ul>
<ul style="list-style-type: none"><li>• 24hr response time</li></ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"><li>• Digital event app</li><li>• QR code links</li></ul>
<ul style="list-style-type: none"><li>• Online file sharing</li></ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"><li>• Through explanation of CEU process</li><li>• Included in master planning timeline</li></ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"><li>• Design and distribute survey</li><li>• Reminders</li><li>• Response data available within 30 days of event</li></ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"><li>• Venue or subcontractor</li></ul>
<ul style="list-style-type: none"><li>• Thoroughly addressed</li></ul>
<ul style="list-style-type: none"><li>• Minimum of 3 participant specific emails – registration, CEU, contact info</li><li>• Reminder emails</li></ul>
<ul style="list-style-type: none"><li>• Intro next steps</li><li>• Confirmation email</li><li>• Speaker reminder email</li><li>• Final detail email</li></ul>
<ul style="list-style-type: none"><li>• Intro next steps</li><li>• Confirmation email</li><li>• exhibitor reminder email</li><li>• Final detail email</li></ul>
<ul style="list-style-type: none"><li>• Coordinate based on planning group wants and budget</li></ul>
<ul style="list-style-type: none"><li>• Signage map</li></ul>
<ul style="list-style-type: none"><li>• pass</li></ul>
<ul style="list-style-type: none"><li>• Initial walkthrough prior to detailed design</li></ul>
<ul style="list-style-type: none"><li>• On-site registration</li></ul>
<ul style="list-style-type: none"><li>• Information desk</li><li>• Technical support</li></ul>

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• pass
• Exhibitor desk for support
• Registration/information desk
• pass
• Mobile or web-based check-in
• pass
• pass
<b>L. Deliverables</b>
• Updated timeline was thoughtful and thorough
<b>M. Reports</b>
• Thoroughly addressed
<b>2. Staffing</b>
• pass
• pass
• pass
<b>3. Implementation - Work Plan</b>
• pass

<b>Part IV, Section IV. Cost Proposal</b>
• Appropriate for size and scope of conference
• Details thoughtfully priced
• Mobile app pricing included

**STATE OF MAINE  
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**DATE:** 8/14/2024

**EVALUATOR NAME:** Miranda Whalen

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience	
<b>1. Overview of the Organization</b>	
<ul style="list-style-type: none"><li>• Created in 2001 with projects throughout New England and nationally</li><li>• Have worked with the Maine Small Business Development Center, the Maine Department of Economic and Community Development, the Maine Office of Tourism, Maine Office of Outdoor Recreation, Maine Department of Labor</li><li>• All three sample projects are multi-day summits – locations CA, ME, and NH</li></ul>	
<b>2. Subcontractors</b>	
<ul style="list-style-type: none"><li>• Two subcontractors listed for A/V services</li></ul>	
<b>3. Organizational Chart</b>	
<ul style="list-style-type: none"><li>• Not required</li></ul>	
<b>4. Litigation</b>	
<ul style="list-style-type: none"><li>• None</li></ul>	
<b>5. Financial Viability</b>	
<ul style="list-style-type: none"><li>• Met</li></ul>	
<b>6. Certificate of Insurance</b>	
<ul style="list-style-type: none"><li>• CEU Certification Plan + PCI-DSS – demonstrated knowledge of the process</li><li>• COI - met</li></ul>	

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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Green Tree will manage meeting schedule</li><li>• Provided sample frequency of every two weeks for one hour with increased frequency in the final two months before the event</li></ul>
<ul style="list-style-type: none"><li>• Green Tree will create timeline and manage progress</li><li>• Will share schedule via cloud-based sharing services as well as with meeting agendas</li></ul>
<ul style="list-style-type: none"><li>• Will provide 24-36 hours prior</li></ul>
<ul style="list-style-type: none"><li>• Will provide within 24-36 hours after</li></ul>
<ul style="list-style-type: none"><li>• Listed four team members to be assigned to the project</li><li>• Green Tree has systems, processes, tools and templates specific to conference planning</li></ul>
<ul style="list-style-type: none"><li>• Kick-off meeting will include a SWOT analysis to learn about the purpose, goals, key performance indicators, and where support is most needed</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• Green Tree has in-house graphic design experience and can work with existing contractors and/or vendors</li><li>• Noted that costs are to be approved before proceeding</li><li>• Green Tree will work with Planning Team to identify dissemination assets and develop strategy for additional channels</li></ul>
<ul style="list-style-type: none"><li>• Met</li></ul>
<ul style="list-style-type: none"><li>• Would use online printers and direct mail vendors</li></ul>
<ul style="list-style-type: none"><li>• Will respond to inquiries within 24-36 hours</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Demonstrated familiarity with State of Maine website requirements with three examples</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>• Will manage materials through online link for presenter to submit</li></ul>
<ul style="list-style-type: none"><li>• Will ensure the event stays in line with the established budget while managing speaker fees and reimbursements</li></ul>
<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"><li>• Named a member of staff responsible</li><li>• Will also design floorplan and layout and manage pre-event logistics</li></ul>

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<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"><li>• Will assist in development of day-of plans including timelines, assignments, locations, and content</li></ul>
<ul style="list-style-type: none"><li>• Met</li></ul>
<ul style="list-style-type: none"><li>• Will subcontract a Maine based AV company</li></ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"><li>• Will utilize online registration platform and create a custom site for the event</li><li>• Provided suggestions for on-site registration staffing and materials that will be produced/available</li></ul>
<ul style="list-style-type: none"><li>• Met</li></ul>
<ul style="list-style-type: none"><li>• Registration system will be used to manage registrations, accommodations, and transportation</li><li>• Support to participants provided within 24 hours of phone or email</li></ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"><li>• Provided examples of tools regularly used for this task and expressed experience in creating and managing digital materials</li></ul>
<ul style="list-style-type: none"><li>• Materials to be stored in an online file sharing system and a tracking sheet maintained</li></ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"><li>• Demonstrated knowledge of the process</li><li>• Planning timeline will include CE application deadlines</li></ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"><li>• Survey to be drafted prior to the event and deployed within 24-48 hours of the event</li><li>• Summary and all response data to be provided within 30 days</li><li>• Offline/check invoices and payments will be an option</li><li>• Preliminary financial report within 30 days, with a final report within 60 days</li></ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"><li>• Will work with venue's services and/or subcontract for necessary equipment</li><li>• AV services include stage décor and lighting, room lighting, speaker presentation management, technical rehearsals and professional recording</li></ul>
<ul style="list-style-type: none"><li>• Green Tree will work directly with the venue</li></ul>
<ul style="list-style-type: none"><li>• Minimum of three participant-specific email communications pre-event</li><li>• Participant support will be provided via phone and email, as well as updated website</li></ul>
<ul style="list-style-type: none"><li>• Minimum of four speaker-specific email communications pre-event</li></ul>

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<ul style="list-style-type: none"> <li>• Speaker support also provided via phone and email</li> </ul>
<ul style="list-style-type: none"> <li>• Minimum of four exhibitor/poster presenter-specific email communications pre-event</li> <li>• Speaker support also provided via phone, email, and at onsite desk during load-in times</li> </ul>
<ul style="list-style-type: none"> <li>• Will coordinate design, procurement and distribution</li> </ul>
<ul style="list-style-type: none"> <li>• Can produce materials pre-event as well as onsite</li> <li>• Will design, produce, and install event signage following signage map developed</li> <li>• Green Tree staff may be present at transition times to provide direction to attendees</li> </ul>
<ul style="list-style-type: none"> <li>• Will manage receipt of materials, transport to venue, set up and breakdown</li> </ul>
<ul style="list-style-type: none"> <li>• Will do initial walk-through to brainstorm space usage, design and present floorplans, and at 4 weeks prior will provide a detailed run-of-show to the venue, vendors, contractors, committee</li> <li>• Green Tree team will be onsite for all conference activities</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<ul style="list-style-type: none"> <li>• Will be completed as part of onsite registration &amp; information desk</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<ul style="list-style-type: none"> <li>• Will staff an onsite exhibitor services desk for this purpose</li> </ul>
<ul style="list-style-type: none"> <li>• Dedicated staff member will be available via phone and email</li> <li>• Onsite will have a registration/information desk staffed for the duration of the event</li> </ul>
<ul style="list-style-type: none"> <li>• Listed various methods from online submission forms, QR check in/out, paper forms, and other tools.</li> </ul>
<ul style="list-style-type: none"> <li>• Can recommend specific mobile app tools for this process</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<b>L. Deliverables</b>
<ul style="list-style-type: none"> <li>• Drafted a recommended updated timeline with due dates falling earlier than those in Table 1</li> </ul>
<b>M. Reports</b>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"> <li>• Met</li> </ul>
<ul style="list-style-type: none"> <li>• Met</li> </ul>

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• Met
<b>3. Implementation - Work Plan</b>
• Highly detailed work plan provided

<b>Part IV, Section IV. Cost Proposal</b>
•



**STATE OF MAINE  
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**RFP TITLE:** Planning and Coordination for the Statewide Infectious Disease Conference

**BIDDER NAME:** Healthcentric Advisors

**DATE:** August 19, 2024

**EVALUATOR NAME:** Caitlin Anton

**EVALUATOR DEPARTMENT:** DHHS/Division for Disease Surveillance

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Nationally recognized non-profit</li><li>• Have partnered with federal and local government agencies</li><li>• Has subject matter experts in infection prevention, education, project management, and coalition building/event planning.</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Abt Associates for MDPH Substance Use Disorders in Long Term Care projects</li></ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"><li>• Staffing plan is included and shows each staff members experience and qualifications</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Included</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Included</li></ul>

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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Able to facilitate virtual planning meetings and meet our requirements</li><li>• Will create a project timeline</li><li>• Able to meet requirement with developed agenda.</li><li>• Will provide meeting minutes to keep everyone informed – this includes action items and deadlines.</li><li>• They use a staffing plan to meet conference goals</li><li>• They have appropriate resources and experience to deliver</li><li>• They use subject matter experts that have healthcare expertise</li><li>• QIN-QIO work may be helpful</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• Save the dates will be created and promoted through direct email, newsletters, social media, and other meetings and events.</li><li>• Digital promotion – email, brochure, website, social media</li><li>• Mailings</li><li>• Additional materials based on feedback from planning group</li><li>• They have experience to do this efficiently and effectively and in a timely manner.</li><li>• There will be a dedicated help desk</li><li>• Website</li><li>• Phone and email</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Will use Cvent platform</li><li>• Website and registration will be covered through this platform</li><li>• Cvent also will cover check in, digital agenda, material, and CEU management</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>• Will be able to meet the 8 week pre conference deadline for identifying potential speakers.</li><li>• Able to meet these needs and have already connected with Portland hotels to negotiate pricing.</li></ul>
<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"><li>• Will use Cvent platform</li></ul>
<b>F. Event Planning and Scheduling</b>

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<ul style="list-style-type: none"><li>• Will solicit 25 exhibitors</li><li>• We will not need poster presentations – this was taken out of our RFP.</li></ul>
<ul style="list-style-type: none"><li>• Requirement met</li></ul>
<ul style="list-style-type: none"><li>• There will be onsite staff available for technical support.</li></ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"><li>• Cvent will be used</li></ul>
<ul style="list-style-type: none"><li>• They will offer accommodation options during registrations</li><li>• Interpreting services will be provided as needed</li></ul>
<ul style="list-style-type: none"><li>• Help desk will be available to provide support via phone or email.</li><li>• Event website will have accommodations, directions and transportation options.</li></ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"><li>• Cvent will offer a mobile app to access the event info</li><li>• All info will be contained in the mobile app and can be accessed through the QR code. CE</li></ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"><li>• 6 CEUS will be offered through local and regional partners</li><li>• Timelines and deadlines for CEUs will be shared with the planning group and additional CEUS can be applied for if needed.</li></ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"><li>• Evaluations will be offered, requirements for CEUs providers will be met.</li></ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"><li>• Will work with event venue for IT and audiovisual needs.</li></ul>
<ul style="list-style-type: none"><li>• All requirements will be met and they have started contacting potential venues in Portland to secure dated and pricing.</li></ul>
<ul style="list-style-type: none"><li>• They are able to meet the requirements. Communications team will distribute materials</li></ul>
<ul style="list-style-type: none"><li>• One staff member will be dedicated to this</li></ul>
<ul style="list-style-type: none"><li>• Exhibitors will receive info in a timely manner, and they will ensure that they are well prepared and confident about participating</li></ul>
<ul style="list-style-type: none"><li>• Awards and materials will be ordered by them, they will make sure its within our budget.</li></ul>
<ul style="list-style-type: none"><li>• They will take care of this by using Cvent.</li><li>• They will determine the best placement for signage.</li></ul>
<ul style="list-style-type: none"><li>• They will be able to accommodate this request.</li></ul>

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<ul style="list-style-type: none"><li>• A walk through will be conducted to ensure all details are taken care of and requirements are met.</li></ul>
<ul style="list-style-type: none"><li>• They will offer onsite support that will handle everything with registration fees, name tags, info packets, sign ins and CEUS.</li></ul>
<ul style="list-style-type: none"><li>• There will be staff available to welcome speakers/presenters and offer technical support and any other assistance they need.</li></ul>
<ul style="list-style-type: none"><li>• They will contact the venue to make sure back-up equipment is available.</li></ul>
<ul style="list-style-type: none"><li>• A staff member will be available to welcome exhibitors and offer technical support or any other assistance they need.</li></ul>
<ul style="list-style-type: none"><li>• An information table will be available post-registration for anyone needing assistance during the conference.</li></ul>
<ul style="list-style-type: none"><li>• They will be doing this for us.</li></ul>
<ul style="list-style-type: none"><li>• They will manage this using Cvent.</li></ul>
<ul style="list-style-type: none"><li>• Cvent will be used to deliver certificated</li></ul>
<ul style="list-style-type: none"><li>• They will pack and remove all conference related materials.</li></ul>
<b>L. Deliverables</b>
<ul style="list-style-type: none"><li>• Able to meet all deadlines.</li></ul>
<b>M. Reports</b>
<ul style="list-style-type: none"><li>• Will be able to submit all required reports.</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Provided.</li></ul>
<ul style="list-style-type: none"><li>• NA</li></ul>
<ul style="list-style-type: none"><li>• Provided.</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Provided.</li></ul>

<b>Part IV, Section IV. Cost Proposal</b>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Planning and Coordination for the Statewide Infectious Disease Conference

**BIDDER NAME:** Healthcentric Advisors

**DATE:** 8/14/2024

**EVALUATOR NAME:** Amanda Luciano

**EVALUATOR DEPARTMENT:** DHHC/MECDC/Maine Immunization Program

\*\*\*\*\*

**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 Facilitator for this RFP.*

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Experienced working with healthcare organizations</li><li>• Has network of providers within New England area</li><li>• Will offer 6 CEU's for providers attending who qualify</li><li>• Timeline will need adjusting</li><li>• Cvent software used to utilize electronic registration, materials for event, resources, etc.. everything done using Cvent software</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• Use Cvent software to generate event</li><li>• Provided Data Security Standards</li></ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"><li>• Clearly outlined of dates/times/responsible staff</li><li>• Outreached to venues in Portland already</li><li>• Provided extensive outline of staffing assigned along with qualifications/expertise</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• None identified</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Provided statements of anticipated expense</li><li>• Confirmed all finances with planning group for approval</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Liability insurance provided</li></ul>

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Part IV, Section III Proposed Services
1. Services to be Provided
Part II
A. Conference Pre-Planning Meetings
<ul style="list-style-type: none"><li>• Use project management tools to schedule at least 10 business days in advance.</li><li>• Determine appropriate meeting schedule and frequency.</li><li>• Project lead staff will work to create meeting agendas and maintain an action log tracking progress.</li><li>• Ability to conduct meetings virtually on multiple platforms</li></ul>
<ul style="list-style-type: none"><li>• Implements a structured and flexible approach with timelines/deadlines.</li><li>• Creates detailed project timeline and provide regular status updates</li><li>• Prioritizes understanding the discussions/requests to ensure all information for the planning group are on the same page</li></ul>
<ul style="list-style-type: none"><li>• Planning meeting agendas prepared and sent at least one business day prior to meeting.</li><li>• Includes all relevant pre-meeting items</li></ul>
<ul style="list-style-type: none"><li>• Detailed action plan minutes are distributed within 5 business days of any meetings</li><li>• Meetings serve as practical tool for advancing event planning.</li><li>• Ensuring clear context and no details are overlooked</li></ul>
<ul style="list-style-type: none"><li>• Provides a multidisciplinary team with experience in healthcare quality improvement and event management.</li><li>• Integrates multiple staffing expertise support to ensure seamless event</li><li>• Leverage diverse staffing skills to ensure cohesive and successful event</li></ul>
<ul style="list-style-type: none"><li>• Ability to offer healthcare expertise and strong communication skills.</li><li>• Subject matter experts bring experience to accommodate the audience and familiar with infection disease prevention.</li><li>• Will craft messaging to resonate with diverse audience.</li><li>• Leverage understanding of Maine healthcare system to ensure conference content is tailored</li></ul>
B. Conference Advertising and Participant Support
<ul style="list-style-type: none"><li>• Communications team with design “save the date” notices using adobe creative suite</li><li>• Available in both paper and electronic copies</li><li>• Will collaborate with planning group to ensure messaging and branding align with State branding guidelines.</li></ul>

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<ul style="list-style-type: none"> <li>• Communications team with handle any and all distribution via email/mail</li> <li>• Able to leverage multiple communication channels to promote event</li> </ul>
<ul style="list-style-type: none"> <li>• Communications team will develop a comprehensive marketing plan for distribution</li> <li>• 1. Digital promotion: direct emails/downloadable brochure/conference website/registration hub/social media</li> <li>• 2. Bulk first-class mailings</li> <li>• 3. Distribution of additional materials</li> <li>• Able to amplify outreach to access large networks of healthcare professionals across New England</li> </ul>
<ul style="list-style-type: none"> <li>• Manage bulk mailings efficiently and promote conference effectively.</li> <li>• Will cover all aspects, including timely distribution of conference materials to designated locations</li> <li>• Support conference attendance goals by determining best timing and content for mailings.</li> </ul>
<b>4. Provide pre-conference support to potential Participants by phone and e-mail.</b>
<ul style="list-style-type: none"> <li>• Provides dedicated staffing for help desk, conference website along with serve as hub of information throughout the event.</li> <li>• Website includes all details of event including logistics along with FAQ of event</li> <li>• Actively encourage participants to reach via phone/email.</li> <li>• Goal to ensure all receive support needed for full conference experience. Offering continues support from start to end.</li> </ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"> <li>• Will utilize Cvent event management platform to host conference and CC payments and digital check-in at time of conference</li> <li>• Website: provides website with privacy statement, adhering to State of Maine IT policies. <ul style="list-style-type: none"> <li>○ Provides website link to department for approval before going public, does not include tik tok.</li> </ul> </li> <li>• Registration: manage all registration and payments through Cvent software</li> <li>• Cvent software supports: <ul style="list-style-type: none"> <li>• On arrival needs: check-in and badging</li> <li>• Attendee hub mobile app – provides agenda, session materials and more</li> <li>• CEU management – certificate automatically emailed to participants who qualify.</li> </ul> </li> </ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"> <li>• Maintains partnerships with key stakeholders in Maine.</li> </ul>



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<ul style="list-style-type: none"><li>• Deeply engaged with Maine healthcare providers through the Quality Innovation Network-Quality Improvement Organization (QIN-QIO) and HQIC contracts from CMS and flex contract with Maine CDC.</li><li>• Ability to maintain robust CRM database, allowing for accuracy.</li><li>• Has a network spans and relationships throughout Maine, New England and beyond.</li><li>• Extensive partnerships allow for broad reach for speakers/presenters/participants</li><li>• Experience in hosting similar conferences</li><li>• Works closely with attendee's, ensuring clear timelines. Outreach will take place 8weeks prior to conference</li><li>• Aim to create a smooth, well-organized experience for all</li></ul>
<ul style="list-style-type: none"><li>• Will coordinate speaker/presenters travel as approved by group and budget</li><li>• Maps out travel, factored into budget</li></ul>
<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"><li>• Will solicit 25 exhibitors</li></ul> <p>Exhibitors:</p> <ul style="list-style-type: none"><li>• Will collaborate with planning group to develop targets, initiating outreach in October 2024. Continued engagement efforts throughout planning months. Registration open March 2025.</li><li>• Adequate space, delivery info, timelines for setup/breakdown, and day of logistics</li></ul> <p>Poster Presentation:</p> <ul style="list-style-type: none"><li>• Will launch application process in February 2025. Includes dedicated committee to manage all communications that include specific parameters, QR codes, timeline/deadlines.</li><li>• Will work closely with venue to create a "gallery walk" to provide participants opportunity to meet/network. Dedicated committee will coordinator and host gallery walk.</li></ul>
<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"><li>• Will employ multifaceted approach for engaging conference experience</li><li>• Subject matter experts ensure sessions meet the needs of group, elicit participant engagement, utilize various teaching modalities.</li><li>• Work with venue to optimize logistics, space and accommodations.</li><li>• Integrate meal/break services</li><li>• Develop networking opportunities</li></ul>
<ul style="list-style-type: none"><li>• Will ensure compliance with ADA and smoke-free laws</li></ul>



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<ul style="list-style-type: none"> <li>• Technical assistance provided with additional support from venue's A/V staff to address technical issues/needs</li> </ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"> <li>• Cvent software and hardware for registration pre-conference and on-site.</li> <li>• Ability to register and pay on conference website ahead of time</li> <li>• Tablets available at conference for on-site reg/payment</li> </ul>
<ul style="list-style-type: none"> <li>• Accommodations request offered during pre-conference registration</li> </ul>
<ul style="list-style-type: none"> <li>• Staffing help desk provided to support pre-conference details</li> </ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"> <li>• Cvent software used to offer Attendee Hub Mobile App</li> <li>• Provides conference event info, agenda, speaker/presenter info etc.</li> <li>• The App provides all information needed for conference at everyone fingertips</li> </ul>
<ul style="list-style-type: none"> <li>• Coordinates planning group to ensure speaker/presenter materials through App</li> </ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"> <li>• Will purchase 6 CEUs for specific groups</li> <li>• Nursing CE, Social Worker CE, physician CME, pharmacy CE</li> <li>• CEUs will be advertised through multiple channels</li> </ul>
<ul style="list-style-type: none"> <li>• Will provide group with CEU timelines/deadlines</li> <li>• Will apply for CE as directed</li> </ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"> <li>• Provides comprehensive conference evals, aligning with CEU requirements for providers</li> <li>• Post-event eval results summarized and sent to planning group and speakers</li> <li>• Completes all post-event reporting for CEUs, invoices, and certifications</li> <li>• Provides detailed financial report related to event</li> </ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"> <li>• Coordinates with venue to ensure all A/V and IT needs are met</li> <li>• Utilize venues equipment and contracting additional services if needed</li> <li>• Use cost-effective management of supplies/equipment</li> </ul>
<ul style="list-style-type: none"> <li>• Will coordinate all logistical needs for the event and procuring venue space.</li> <li>• Has initiated potential contacts for venues in Portland area to ensure all arrangements meet expected requirements</li> </ul>
<ul style="list-style-type: none"> <li>• Communications team produces and distributes all necessary materials for event</li> </ul>

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<ul style="list-style-type: none"> <li>• Dedicated staff assigned to create and provide tailored materials speakers/presenters</li> <li>• Full itinerary provided for speaker/presenters</li> <li>• Information sent well in advance to ensure speaker/presenters are informed and prepared</li> </ul>
<ul style="list-style-type: none"> <li>• Exhibitors will be provided all detailed information well in advance</li> <li>• Verify exhibitors are fully prepared for event</li> </ul>
<ul style="list-style-type: none"> <li>• Ordering of materials as requested, staying within budget</li> </ul>
<ul style="list-style-type: none"> <li>• Creates and distributes all essential materials for event (signs, nametags, packets etc)</li> <li>• Cvent provides mobile check-in and access to Attendee hub mobile app</li> <li>• Communication teams handles all logistical requirements for the event, working closely with venue and planning group to meet all needs</li> </ul>
<ul style="list-style-type: none"> <li>• Will deliver all conference related materials and supplies on schedule</li> </ul>
<ul style="list-style-type: none"> <li>• Conducts walk-through and presentation of all details to ensure meeting all requirements for the event</li> </ul>
<ul style="list-style-type: none"> <li>• Ensure smooth management of registration process with on-site support</li> <li>• Utilizing Cvent to accommodate seamless registration and check-ins</li> </ul>
<ul style="list-style-type: none"> <li>• Assigned staff will greet speakers/presenters and be of assistance throughout the event</li> <li>• Staff a resource center for all those attending/presenting</li> <li>• Will assist with technical issues or any unanticipated issues</li> </ul>
<ul style="list-style-type: none"> <li>• Contract with event venue ensuring backup equipment is available for any A/V difficulties</li> </ul>
<ul style="list-style-type: none"> <li>• Staffing available to welcome exhibitors/presenters</li> <li>• Provide signage and direct where to go</li> <li>• Available for exhibitors/presenters needs</li> </ul>
<ul style="list-style-type: none"> <li>• Information table available for all participants</li> <li>• Table will be visible to all for any questions</li> <li>• Will provide additional staffing for a administration office, resource center for all</li> </ul>
<ul style="list-style-type: none"> <li>• Evals and CE will be documented using Cvent software</li> <li>• Cvent provide accurate eval results</li> <li>• Ability to distribute CEU certificates</li> </ul>
<ul style="list-style-type: none"> <li>• Will manage requests for pro-rated attendance and CE through Cvent</li> </ul>
<ul style="list-style-type: none"> <li>• Cvent provides and delivers electronic certificates for CE and CEU's, hardcopies available upon request</li> </ul>

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<ul style="list-style-type: none"><li>Staffing will pack and remove all equipment and any unused conference materials, ensuring organized wrap-up</li></ul>
<b>L. Deliverables</b>
<ul style="list-style-type: none"><li>Will adhere to key event planning dates outlined in table 1.</li><li>Attachment 9: outlines workplan 9/1/24-6/30/25 - includes detailed task/deliverables, what will be implemented, people responsible for each task with dates for completion.</li></ul>
<b>M. Reports</b>
<ul style="list-style-type: none"><li>All required reports will be submitted to the department following established timelines</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>Staffing plan provided to include each responsible staff and their role, expertise for the event, professional qualifications and skill sets</li></ul>
<ul style="list-style-type: none"><li>N/A</li></ul>
<ul style="list-style-type: none"><li>Detailed staffing plan provided to include staff role and their title. Describes their experience and how their expertise will benefit the event</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>Detailed work plan highlights each month, who is responsible for each task, time needed to complete the task and when next task is due.</li><li>Each staff is assigned on who is responsible along with timelines</li><li>Date ranging from 9/1/24-6/30/25</li></ul>
<b>Part IV, Section IV. Cost Proposal</b>
<ul style="list-style-type: none"><li></li></ul>

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**DATE:** 8/27/2024

**EVALUATOR NAME:** Jessica Shiminski

**EVALUATOR DEPARTMENT:** DHHS CDC

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\*\*\*\*\*

**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Non profit healthcare quality improvement and patient safety org</li><li>• 100-300 participant events</li><li>• HAI prevention centric</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• none</li></ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"><li>• Not included, staffing plan and job descriptions included</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• none</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• included</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• included</li></ul>

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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Project management tools</li><li>• Action item logs to track progress on tasks</li></ul>
<ul style="list-style-type: none"><li>• Detailed project timeline</li><li>• Status updates</li></ul>
<ul style="list-style-type: none"><li>• Agendas include clear objectives, outstanding items and pre-meeting materials</li><li>• Detailed action-oriented minutes</li><li>• Highlighted key decisions, action items and upcoming deadlines</li></ul>
<ul style="list-style-type: none"><li>• Extensive experience</li><li>• Plan integrates project management, communications, SMEs and admin support</li></ul>
<ul style="list-style-type: none"><li>• Healthcare setting and infectious disease prevention specific expertise and communication experience</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• In house communications team</li><li>• Adobe creative suite</li><li>• Electronic and printed</li><li>• E-newsletters, social media and direct email marketing</li></ul>
<ul style="list-style-type: none"><li>• Direct email, downloadable brochures, website, social media campaigns</li><li>• Bulk mailing</li><li>• Leverage extensive contact management system which includes healthcare professionals across New England</li></ul>
<ul style="list-style-type: none"><li>• In house resources</li><li>• Hardware and software</li><li>• Timely distribution</li></ul>
<ul style="list-style-type: none"><li>• Help desk</li><li>• Conference website will serve as info hub</li><li>• Encourage participants to reach out with questions</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Will ensure website adheres to state IT policies</li><li>• Uses Cvent software</li></ul>
<b>D. Conference Speakers/Presenters</b>

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<ul style="list-style-type: none"><li>• Partnerships with MHA, MHCA, Leading Age Maine and the Maine Quality Innovation group</li><li>• Experience hosting similar conferences</li><li>• Goal to create smooth well-organized experience for speakers and attendees</li></ul>
<ul style="list-style-type: none"><li>• Already connected with Portland hotels to negotiate pricing</li></ul>
<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"><li>• Targeted list of potential exhibitors</li><li>• Exhibitor registration opens March 2025</li><li>• Poster presentation review committee</li><li>• Gallery Walk – curated experience to provide participants the opportunity to meet and talk with creators</li></ul>
<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"><li>• SME's to develop sessions</li><li>• Work with venue for room allocations, meal and break services</li><li>• Develop networking opportunities and social activities</li></ul>
<ul style="list-style-type: none"><li>• pass</li></ul>
<ul style="list-style-type: none"><li>• Will utilize venue AV staff</li><li>• Onsite staff will provide technical assistance</li></ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"><li>• Cvent software and hardware</li><li>• Tablets available for on-site registration</li></ul>
<ul style="list-style-type: none"><li>• pass</li></ul>
<ul style="list-style-type: none"><li>• Help desk to provide support</li></ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"><li>• Cvent software to offer attendee hub mobile app</li></ul>
<ul style="list-style-type: none"><li>• Attendee hub mobile app</li></ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"><li>• 6 CEUs offered</li></ul>
<ul style="list-style-type: none"><li>• pass</li></ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"><li>• Comprehensive evaluations to align with CEU requirements</li><li>• Detailed summaries of evaluation results</li></ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"><li>• Event venue use of AV and IT equipment to avoid fees</li></ul>
<ul style="list-style-type: none"><li>• Initiated contact with potential venues in Portland</li></ul>
<ul style="list-style-type: none"><li>• pass</li></ul>

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• pass
• pass
• As requested by department adhering to budget
• Using Cvent – tablet check-in, instant badge printing, and Attendee Hub mobile app
• Communications team will design signage
• pass
• pass
• On site support
• Tablet check-ins, instant badge printing
• Utilize mobile app for digital information packets
• Conference administration office – resource for speakers, presenters, sponsors, exhibitors and vendors to manage issues or technical difficulties
• Utilize event venue equipment
• Provide clear signage and welcome exhibitors
• Staff on hand to assist
• Information table for all participants
• Conference administration office
• Cvent software
• pass
• Cvent software, hardcopies mailed on request
• pass
<b>L. Deliverables</b>
• pass
<b>M. Reports</b>
• pass
<b>2. Staffing</b>
• Comprehensive staffing plan included
• none
• Comprehensive staffing plan included
<b>3. Implementation - Work Plan</b>
• Work plan included

<b>Part IV, Section IV. Cost Proposal</b>
• Missing venue rental
• Missing food and beverage

**STATE OF MAINE  
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- |  |
|--|
| <ul style="list-style-type: none"><li>• Significantly underbid for expected cost</li></ul> |
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**STATE OF MAINE  
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**BIDDER NAME:** Healthcentric Advisors

**DATE:** 8/12/2024

**EVALUATOR NAME:** Miranda Whalen

**EVALUATOR DEPARTMENT:** DHHS-OADS

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**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 Facilitator for this RFP.*

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**Individual Evaluator Comments:**

Part IV. Section II. Organizational Qualification and Experience
<b>1. Overview of the Organization</b>
<ul style="list-style-type: none"><li>• Lists partnerships with Maine Hospital Association, Maine Healthcare Association, Leading Age Maine, and the Maine Quality and Innovation Group – scope and relevance of these partnerships not described</li><li>• Subject matter experts they propose are participating in a planning group for a similar event with the New Hampshire Department of Health in September 2024</li><li>• Work with healthcare facilities across New England and have partnerships with clinicians and subject matter experts nationally</li><li>• 20 years of experience supporting infection prevention education with the Rhode Island Department of Health; hosted in-person events of 100-300 participants plus local and out of state presenters</li><li>• Responsible for planning and hosting quarterly virtual summits for the Massachusetts Department of Public Health: scheduling, topic development, recruitment of speakers, registration, evaluation of summit</li></ul>
<b>2. Subcontractors</b>
<ul style="list-style-type: none"><li>• No form submitted</li></ul>
<b>3. Organizational Chart</b>
<ul style="list-style-type: none"><li>• Not required</li></ul>
<b>4. Litigation</b>
<ul style="list-style-type: none"><li>• Meets – none listed</li></ul>
<b>5. Financial Viability</b>
<ul style="list-style-type: none"><li>• Not part of the packet – was this submitted?</li></ul>
<b>6. Certificate of Insurance</b>
<ul style="list-style-type: none"><li>• Meets – provided valid COI</li></ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202406117

**RFP TITLE:** Planning and Coordination for the Statewide Infectious Disease Conference

**BIDDER NAME:** Healthcentric Advisors

**DATE:** 8/12/2024

**EVALUATOR NAME:** Miranda Whalen

**EVALUATOR DEPARTMENT:** DHHS-OADS

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- |  |
|--|
| <ul style="list-style-type: none"><li>• CEU Certification: Nursing, Social Worker, Physician, and Pharmacy CEUs</li><li>• PCI-DSS certification for Cvent provided</li></ul> |
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<b>Part IV, Section III Proposed Services</b>
<b>1. Services to be Provided</b>
<b>Part II</b>
<b>A. Conference Pre-Planning Meetings</b>
<ul style="list-style-type: none"><li>• Named a project lead to coordinate meeting agendas and action item log</li></ul>
<ul style="list-style-type: none"><li>• Met</li></ul>
<ul style="list-style-type: none"><li>• Provided detail that agendas will list objectives, outstanding items, and any relevant meeting materials</li></ul>
<ul style="list-style-type: none"><li>• Will include context of discussions for future reference</li></ul>
<ul style="list-style-type: none"><li>• Staffing plan for project management, communication, subject matter expertise, and administrative support</li></ul>
<ul style="list-style-type: none"><li>• Will use named subject matter experts, communication team, and Maine's healthcare landscape to tailor content</li></ul>
<b>B. Conference Advertising and Participant Support</b>
<ul style="list-style-type: none"><li>• Will ensure alignment of materials with State branding guidelines</li><li>• Will leverage Healthcentric's existing communications strategies including e-newsletters, social meeting, and related meetings/events to promote the conference and engage with participants, speakers, exhibitors</li></ul>
<ul style="list-style-type: none"><li>• Will leverage Healthcentric's contact management system to complement contacts provided by the Planning Group</li><li>• No detail on methods/resources, how the tasks will be accomplished, how they will ensure desired outcomes are achieved</li></ul>
<ul style="list-style-type: none"><li>• Uses in-house resources from contact lists, printing, postage, and distribution</li><li>• Q – What staffing resources do they have to support this?</li></ul>
<ul style="list-style-type: none"><li>• Will staff a dedicated help desk and provide information on the conference website</li><li>• Q - What staffing resources do they have to support this?</li></ul>
<b>C. Infectious Disease Conference Website Requirements</b>
<ul style="list-style-type: none"><li>• Cvent event management software platform will be used for the website, registration, payment, check-in, digital meeting materials, and CEU management</li><li>• Q - How will they manage accommodation requests?</li></ul>
<b>D. Conference Speakers/Presenters</b>
<ul style="list-style-type: none"><li>• Budget allocated for speaker travel, lodging, and honorariums</li><li>• Q – how will they ensure expectations are achieved?</li></ul>
<ul style="list-style-type: none"><li>• Portland hotels have been contacted to negotiate pricing</li></ul>

# STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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<ul style="list-style-type: none"> <li>Factored road and air travel into budget</li> </ul>
<b>E. Conference Exhibits and Poster Displays</b>
<ul style="list-style-type: none"> <li>Exhibitor registration to open in March 2025; poster presentation application process to launch in February 2025</li> <li>Q – what platform will be used for registration/application and submission of materials?</li> <li>Did not address E.1.a.</li> </ul>
<b>F. Event Planning and Scheduling</b>
<ul style="list-style-type: none"> <li>Will work with subject matter experts and venue in scheduling and organizing the sessions</li> <li>Q – at what point will they integrate the Conference Planning Group?</li> </ul>
<ul style="list-style-type: none"> <li>Meets</li> </ul>
<ul style="list-style-type: none"> <li>Meets</li> </ul>
<b>G. Participant Registration</b>
<ul style="list-style-type: none"> <li>Will use Cvent for these tasks</li> <li>Will provide tablets on-site for registration and payment</li> </ul>
<ul style="list-style-type: none"> <li>Q – states will offer accommodation request options. How many and what options will they offer?</li> </ul>
<ul style="list-style-type: none"> <li>Will establish and staff a help desk to provide support via phone and email</li> <li>Q – what will be the availability of the help desk?</li> <li>Q – what will be the response time to messages and emails?</li> </ul>
<b>H. Material Preparation and Distribution</b>
<ul style="list-style-type: none"> <li>Cvent will be used for “Attendee Hub Mobile App”</li> <li>Q – will attendees be able to access materials without downloading an app? (consideration for work phones that do not allow app downloads)</li> <li>Did not specify that there will be a QR Code scanning system</li> </ul>
<ul style="list-style-type: none"> <li>Did not provide detail</li> </ul>
<b>I. Continuing Education Credits</b>
<ul style="list-style-type: none"> <li>Met</li> </ul>
<ul style="list-style-type: none"> <li>Met</li> </ul>
<b>J. Educational Workshop Evaluations</b>
<ul style="list-style-type: none"> <li>Did not provide detail</li> </ul>
<b>K. General Conference Support</b>
<ul style="list-style-type: none"> <li>Met</li> </ul>
<ul style="list-style-type: none"> <li>Have initiated contact with Portland area venues</li> </ul>
<ul style="list-style-type: none"> <li>Did not provide detail</li> </ul>

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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<ul style="list-style-type: none"><li>• A staff member will be assigned to this deliverable</li></ul>
<ul style="list-style-type: none"><li>• Will send in advance, confirm receipt, and provide support</li></ul>
<ul style="list-style-type: none"><li>• Will send in advance, confirm receipt, and verify readiness</li></ul>
<ul style="list-style-type: none"><li>• Will consider the budget and ensure financial efficiency</li></ul>
<ul style="list-style-type: none"><li>• Will use Cvent for badge printing and Attendee Hub for digital packets</li><li>• Communications team responsible for signage and will work with the venue on best placement</li></ul>
<ul style="list-style-type: none"><li>• Did not provide detail</li></ul>
<ul style="list-style-type: none"><li>• Did not provide detail</li></ul>
<ul style="list-style-type: none"><li>• Will use Cvent for registration, badging, and digital packets</li></ul>
<ul style="list-style-type: none"><li>• Will staff a resource center for issues</li></ul>
<ul style="list-style-type: none"><li>• Venue will be contracted to ensure backup equipment</li></ul>
<ul style="list-style-type: none"><li>• Will have staff dedicated to assist exhibitors</li></ul>
<ul style="list-style-type: none"><li>• Will mark the table with signage as well as staff a resource center</li></ul>
<ul style="list-style-type: none"><li>• Will use Cvent to collect documentation</li></ul>
<ul style="list-style-type: none"><li>• Will use Cvent for early departure sign-outs to track participation</li></ul>
<ul style="list-style-type: none"><li>• Will use Cvent to produce and deliver electronic certifications</li><li>• Certificates mailed upon request</li></ul>
<ul style="list-style-type: none"><li>• Did not provide detail</li><li>• Q – what timeline? How many staff?</li></ul>
<b>L. Deliverables</b>
<ul style="list-style-type: none"><li>• Listed Attachment 9</li></ul>
<b>M. Reports</b>
<ul style="list-style-type: none"><li>• No details provided for reports</li><li>• Q – who will be responsible? How will reports be provided?</li></ul>
<b>2. Staffing</b>
<ul style="list-style-type: none"><li>• Met</li></ul>
<ul style="list-style-type: none"><li>• N/A</li></ul>
<ul style="list-style-type: none"><li>• Met</li></ul>
<b>3. Implementation - Work Plan</b>
<ul style="list-style-type: none"><li>• Met</li></ul>

<b>Part IV, Section IV. Cost Proposal</b>
<ul style="list-style-type: none"><li>• </li></ul>



**STATE OF MAINE  
DEPARTMENT OF HEALTH AND HUMAN  
SERVICES**

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Acting Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202406117**

**RFP TITLE: Planning and Coordination for the Statewide Infectious Disease Conference**

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

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

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

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

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

DocuSigned by:

Caitlin Anton

A8A0666E2E4240F...

**Signature**

Jul-30-2024

**Date**



**STATE OF MAINE  
DEPARTMENT OF HEALTH AND HUMAN  
SERVICES**

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Acting Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202406117**

**RFP TITLE: Planning and Coordination for the Statewide Infectious Disease Conference**

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

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DocuSigned by:

*Amanda Luciano*

7E4DAAG880854DE...

**Signature**

Jul-30-2024

**Date**



**STATE OF MAINE  
DEPARTMENT OF HEALTH AND HUMAN  
SERVICES**

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Acting Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202406117**

**RFP TITLE: Planning and Coordination for the Statewide Infectious Disease Conference**

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

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DocuSigned by:

*Jessica Shiminski*

070E1E0F0B6240B...

**Signature**

Jul-30-2024

**Date**





**STATE OF MAINE  
DEPARTMENT OF HEALTH AND HUMAN  
SERVICES**

**Janet T. Mills  
Governor**

**Sara Gagné-Holmes  
Acting Commissioner**

**AGREEMENT AND DISCLOSURE STATEMENT  
RFP #: 202406117**

**RFP TITLE: Planning and Coordination for the Statewide Infectious Disease Conference**

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

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DocuSigned by:

*Miranda Whalen*

47FA02C0A50040D...

**Signature**

Jul-30-2024

**Date**