

State of Maine
Master Score Sheet

RFP# 202411196					
Economic Development Social Equity Program Establishment and Administration					
Bidder Name:		Acadia Capital Management L3C	Black Owned Maine	Empress Rules Equity Consulting	Global Reach Strategies, Inc
Proposed Cost:		\$282,000	\$299,731.93	\$294,900	\$300,000
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	30	29	26	24	18
Section III: Proposed Services	40	35	30	34	24
Section IV: Cost Proposal	30	30	28.23	28.69	28.2
TOTAL	<u>100</u>	<u>94</u>	<u>84.23</u>	<u>86.69</u>	<u>70.2</u>
Bidder Name:		Roads Consulting Group	Ryse Local Ventures, LLC	UPLEVEL Management	
Proposed Cost:		\$300,000**	\$285,000	\$297,500*	
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	
Section II: Organization Qualifications and Experience	30	28	21	20	
Section III: Proposed Services	40	35	35	30	
Section IV: Cost Proposal	30	28.2	29.68	28.44	
TOTAL	<u>100</u>	<u>91.2</u>	<u>85.68</u>	<u>78.44</u>	

*Total includes planned \$150,000 seed funding not listed in bidder's "Proposed Total Cost"

**Total includes planned \$150,000 seed funding listed in bidder's cost proposal but not factored into "Proposed Total Cost"

Award Justification Statement
RFP# 202411196 - Economic Development Social Equity Program
Establishment and Administration

I. Summary

The State of Maine sought proposals for a qualified professional firm to assist in the establishment and administration of a social equity program per the requirements of [H.P. 972 - L.D. 1517, An Act to Establish a Social Equity Program](#). With oversight and strategic direction provided by the Department of Economic & Community Development (DECD), the services will include designing and implementing a program to increase workforce development programs and provide support to individuals who are members of impacted communities and businesses that are owned by members of impacted communities.

It is anticipated that any bidders who can show previous experience in workforce and business development related to social equity will receive higher scores. Successful bidders must be able to design programming that complements existing work being done by the State of Maine in these areas, including workforce development, social equity, and increasing support to businesses owned by impacted communities.

II. Evaluation Process

The evaluation process was conducted by a team of three individuals from DECD's Office of Business Development. All evaluators have experience in state government, business development, workforce development, and the State's procurement procedures. Individual reviews were conducted according to the RFP process with sufficient time to analyze submitted proposals. Individual notes were compiled and used to review each proposal in the team evaluation meeting held on 3/11/2025. During this meeting, the three evaluators reported their findings with notes maintained by a designated individual not assigned as an evaluator. The evaluators applied the consensus method in scoring the Bidders Qualifications and Experience and Proposed Services. Scores for the cost proposal were assigned using a mathematical formula. The team reviewed all proposals individually in a methodical process and without measurement against other submissions. Points were assigned and calculated according to the RFP with the award assigned to the highest scoring bidder.

III. Qualifications & Experience

The successful bidder's previous experience showed clear relevance to the goals and purposes of the RFP. The past projects demonstrate success in the following areas:

- Strength of the organization with subject matter expertise in serving diverse entrepreneurs.

- Experience collaborating with community organizations, government agencies, business owners, financial institutions, and other stakeholders.
- Acacia Capital Management's experience with workforce development programs, government, technical assistance, and grants management directly related to the required services.
- Comprehensive proposed services and efficient implementation timeline.

IV. Proposed Services

The bidder's experience and qualifications in business development, serving impacting communities, and designing a comprehensive plan for project success yielded high scores for:

- Proposed services include business development services, grant administration, and technical assistance.
- Work Plan implementation includes required legislative reporting, communication, meetings, data collection, establishment of advisory committees, and preparation of project materials.

V. Cost Proposal

Respondent	Cost of Lowest Cost Proposal	/	Cost Proposal Being Scored	X	Score Weight	=	Score
Acadia Capital Management L3C	\$282,000	/	\$282,000	X	30 points	=	30
Black Owned Maine	\$282,000	/	\$299,731.93	X	30 points	=	28.23
Empress Rules Equity Consulting	\$282,000	/	\$294,900	X	30 points	=	28.69
Global Reach Strategies, Inc.	\$282,000	/	\$300,000	X	30 points	=	28.2
Roads Consulting Group	\$282,000	/	\$300,000	X	30 points	=	28.2
Ryse Local Ventures	\$282,000	/	\$285,000	X	30 points	=	29.68
UPELVEL Management	\$282,000	/	\$297,500	X	30 points	=	28.44

VI. Conclusion

Out of 100 points, Acadia Capital Management L3C scored the highest, with 94 points awarded by the evaluation team. The strengths of Acadia Capital Management L3C's proposal include deep experience in the services needed in the Social Equity Program. The organization's prior experience with relevant projects and subject matter expertise were clear. The deliverables and work plan were well-designed and matched the RFP requirements. As a result of these factors and the highest-scoring cost proposal, the evaluation team determined this organization brings the most value to the State of Maine.



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



**Janet T. Mills
Governor**

**Heather Johnson
Commissioner**

April 4, 2025

Acadia Capital Management L3C
499 Broadway STE 118
Bangor, ME 04401

SUBJECT: Notice of Conditional Contract Award under RFP # 202411196,
Economic Development Social Equity Program Establishment and Administration

Dear Dr. Brien C. Walton:

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

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

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

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

Sincerely,

Eric Weidman

Eric P. Weidman

Business Development Coordinator
Office of Business Development
Department of Economic & Community Development
111 Sewall St
Augusta, ME 04330-6830
207-557-3841
eric.p.weidman@maine.gov

STATEMENT OF APPEAL RIGHTS

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



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April 4, 2025

Black Owned Maine
411 Congress St
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award under RFP # 202411196,
Economic Development Social Equity Program Establishment and Administration

Dear Danica Rose Barboza:

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

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April 4, 2025

Empress Rules Equity Consulting
123 E Powell Blvd Ste #305
Gresham, OR 97080

SUBJECT: Notice of Conditional Contract Award under RFP # 202411196,
Economic Development Social Equity Program Establishment and Administration

Dear Kheoshi Owens:

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

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**Heather Johnson
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April 4, 2025

Global Reach Strategies, Inc
615 34th St.
Richmond, CA 94805

SUBJECT: Notice of Conditional Contract Award under RFP # 202411196,
Economic Development Social Equity Program Establishment and Administration

Dear Dr. Ayoka Nurse:

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

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April 4, 2025

Roads Consulting Group
974 Bennington St
East Boston, MA 02128

SUBJECT: Notice of Conditional Contract Award under RFP # 202411196,
Economic Development Social Equity Program Establishment and Administration

Dear Jose Perez:

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

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April 4, 2025

Ryse Local Ventures, LLC
1835 7th St NW, Unit 204
Washington, DC 20001

SUBJECT: Notice of Conditional Contract Award under RFP # 202411196,
Economic Development Social Equity Program Establishment and Administration

Dear Kayla Baker:

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

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**Heather Johnson
Commissioner**

April 4, 2025

UPLEVEL Management
3255 Bramanti Trail
South Chicago Heights, IL 60475

SUBJECT: Notice of Conditional Contract Award under RFP # 202411196,
Economic Development Social Equity Program Establishment and Administration

Dear Zakiya Moton:

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

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Acadia Capital Management L3C

DATE: March 11, 2025

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Office of State Procurement Services as part of your contract award selection documents.

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Eric Weidman

Names of Evaluators: Charlotte Mace, Ben Sturtevant, Eric Weidman

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Appendix B (responsible Bidder Certification))	x	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	29
Section III. Proposed Services	40	35
Section IV. Cost Proposal	30	30
<u>Total Points</u>	<u>100</u>	<u>94</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Acadia Capital Management L3C

DATE: March 11, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Acadia Capital Management L3C

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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	30	29

Evaluation Team Comments:

I. Overview of Organization

- Organization has been in business for a number of years and has performed numerous projects.
- Considerable number of relevant projects, e.g., worked with FAME and assisted with the State of Maine's domestic trade program
- Had staff is the Maine Venture Fund board chair, which shows connection to business resources and experience disseminating funds.
- Minority-owned business with a focus on finance and business/entrepreneur success
- Background of CEO and implementation lead has credibility with higher education, businesses, and community organizations throughout Maine
- Description of qualifications and experience strong, including specific relevant details
- Specific subject matter expertise is strong, including workforce development programs, government, technical assistance, and grants management.
- Financial literacy education and business support for diverse entrepreneurs are part of the organization's previous and current work.
- Having a certified project manager on staff is a benefit

II. Subcontractors (if applicable)

- none

III. Organizational Chart

- Organizational chart is easy to understand

IV. Litigation

- none

V. Financial Viability

- Financial viability is acceptable

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Acadia Capital Management L3C

DATE: March 11, 2025

- Dun & Bradstreet Business Information Report Snapshot provided

VI. Licensure/Certification

- Not required
- Community Development Entity certification by the U.S. Department of Treasury (not required for this work)

VII. Certificate of Insurance

- Included - current

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Acadia Capital Management L3C

DATE: March 11, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	35

Evaluation Team Comments:

III. Proposed Services

A. Services to be Provided

- The project plan was impressive and comprehensive.
- Specific methods and tasks such as business toolkit and digital collaboration stood out as strong.
- Services to be provided were listed appropriately
- Business services proposed to start around months 3 and 4.
- Proposed digital marketing tactics could have had greater detail.
- Project Management & Administration plan contains clear methods, resources, implementation strategies, and defined outcomes
- Communication and meeting schedules are designed efficiently.

B. Implementation – Work Plan

- Deliverables List - good
- In the work plan are good examples of deliverables regarding the design of the grant program.
- Plan and deliverables align with RFP.
- Good work plan with implementation schedule of proposed services.
- Timeline of legislative reporting included, which is helpful.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Acadia Capital Management L3C

DATE: March 11, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$282,000	÷	\$282,000	x	30 points	=	30 points

Evaluation Team Comments:

The cost proposal received the maximum score as the lowest bid amount.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

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DATE: March 11, 2025

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Names of Evaluators: Charlotte Mace, Ben Sturtevant, Eric Weidman

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Section III. Proposed Services	40	30
Section IV. Cost Proposal	30	28.23
<u>Total Points</u>	<u>100</u>	<u>84.23</u>

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TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Black Owned Maine

DATE: March 11, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Included – as required.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Black Owned Maine

DATE: March 11, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	26

Evaluation Team Comments:

I. Overview of Organization

- Black-led nonprofit with a proven track record of serving 70% black-owned businesses in Maine.
- Bilingual staff with experience serving minority business owners.
- Focused on a grassroots approach with connections to community organizations.
- Qualifications and experience had key areas of expertise in alignment of RFP (5 different areas).
- Referenced culturally relevant program materials which weren't a requirement but showed their subject matter expertise.
- Experience helping organizations get loans and navigate business pressures
- Previous hub and spoke work for DECD using a culturally responsive trauma-informed approach.
- Good Shepherd Food Bank projects (examples 2-3) are relevant and relate to Social Equity but do not align well with business services central to the RFP.
- Overall, their organization seems to lack the business development/assistance expertise that will be needed for this work.

II. Subcontractors (if applicable)

- J. Lorne Studios Denver, Colorado Jason Giles Virtual agency with no phone number but can be reached at jason@jlorne.studio
- Subcontractor to be used for creative services vendor and IT. Question over the need for IT support.

III. Organizational Chart

- Strong team with related qualifications

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Black Owned Maine

DATE: March 11, 2025

- The listed Chief of Strategy and Innovation would be responsible for technical and security compliance, but the proposal didn't talk about this. Stated that they would work with Google Workspace -which does not align with the RFP.
- Concern: The project will be done by two business consultants who haven't been hired. Considered a significant risk as the project will be contingent on hiring two consultants for whom we won't have a chance to evaluate their experience. The majority of project work will be conducted by the two yet-to-be-hired business consultants.

IV. Litigation

- none

V. Financial Viability

- Acceptable, no issues flagged with this.
- Dun & Bradstreet Business Information Report Snapshot account created. "We signed up for our DUNs number to comply with the requirements of this bid so it does not show any financial information. We can provide financial statements upon request."

VI. Licensure/Certification

- None

VII. Certificate of Insurance

- Provided – current.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Black Owned Maine

DATE: March 11, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	30

Evaluation Team Comments:

III. Proposed Services

A. Services to be Provided

- Project Management -“tech-forward approach” includes Google Workspace -not consistent with RFP
- Favorable subject matter expertise comes across as showing experience in a trauma-informed framework, which is good.
- Surveying the public for input is a positive component
- Tax credit education is listed as a core service with other business supports not identified.
- Positive – business services to all seed fund applicants
- Concern- The bidder has proposed seed fund award amounts and numbers before the grant program has been designed or launched.
- Proposed service related to communication- minutes will be automatically uploaded to the web page. DECD would rather the process be determined by the Advisory Committee as the project progresses.

B. Implementation – Work Plan

- Deliverables List provided
- Newly hired business consultant training in month 2-timing?
- Overall work plan is fine
- Timeline well thought out and thorough
- Suggestion of 2 Legislative reports, whereas there is only one in statute. Was the related statute fully researched before plan development?
- Similarly, the plan for a bi-annual audit is not mentioned in the RFP.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Black Owned Maine

DATE: March 11, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$282,000		\$299,731.93	x	30 points	=	28.23 points

Evaluation Team Comments:

Score tabulated above.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Empress Rules Equity Consulting

DATE: March 11, 2025

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Office of State Procurement Services as part of your contract award selection documents.

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Eric Weidman

Names of Evaluators: Charlotte Mace, Ben Sturtevant, Eric Weidman

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Appendix B (responsible Bidder Certification))	x	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	24
Section III. Proposed Services	40	34
Section IV. Cost Proposal	30	28.69
<u>Total Points</u>	<u>100</u>	<u>86.69</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Empress Rules Equity Consulting

DATE: March 11, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- All requirements met

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Empress Rules Equity Consulting

DATE: March 11, 2025

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	30	24

Evaluation Team Comments:

I. Overview of Organization

- Based in Oregon, it provides comprehensive DEI services. Focused on strategic planning and community engagement, not business assistance.
- CEO has an MBA, is a Master Facilitator, and has a Certification in Strategy Execution from Harvard Business School – quite impressive.
- CEO has expertise in strategic problem solving, helpful but not highly relevant. Master Facilitator expertise could be useful in advisory meetings.
- Good experience with community and training, social equity training but not business services
- Policy development, roadmap creation, and audit experience are not directly relevant.
- Overall wealth of SEP experience, experience working with BIPOC populations, and stakeholder consultation, although unrelated to business development.

II. Subcontractors (if applicable)

- Breaking Through Facilitation - Danise Elijah
Unrelated experience in menstrual health equity.
- Elite Renewable Energy Consult - Nichet Newsome
Experience is primarily related to renewable energy, not directly relevant.
- MamaBerry Consulting - Paula Handberry
Primary experience is with social equity training programs and work in the communities and within schools. Her experience appears to be mostly in educational settings.

III. Organizational Chart

- Provided
- CEO assisted by three sub-contractors

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Empress Rules Equity Consulting

DATE: March 11, 2025

- The management team seemed diffuse, each member has different experience and skills.
- Sub-contractors have a lack of business development experience

IV. Litigation

- none

V. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot provided
- Financial viability is adequate

VI. Licensure/Certification

- N/A

VII. Certificate of Insurance

- Provided - current

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Empress Rules Equity Consulting

DATE: March 11, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	34

Evaluation Team Comments:

III. Proposed Services

A. Services to be Provided

- Proposed services: structured meeting agendas, generating agendas ahead of meetings, documented program insights, accessible pdf resources - all positive.
- Closely followed what we wanted in the RFP and in a logical manner
- Strong sense of what the proposal was about, but not as clear as how they would design that
- In proposed services: their response indicates they read the RFP and what it is asking for. A few of the tasks they describe aren't consistent with what the RFP asks (e.g., healing initiatives).
- Focus on community design without specifics.
- Technical Assistance plans are a little weak in defining implementation strategies.
- Plans for communications looked appropriate.
- The concept of business advisory services including having a workshop seemed like a great approach.
- Their approach to creating and distributing materials is good
- Overall consistent with RFP.

B. Implementation – Work Plan

- Deliverables List
- Concerns over the methods, but the general goal seemed aligned
- Include helpful details in some areas but in other areas, it could be more specific (e.g., criteria development for the grant program).
- Multiple suggested tasks not in the RFP (e.g., mapping ongoing state initiatives, influencing policymaking)
- Their term "inquiry readiness" is a strong addition

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Empress Rules Equity Consulting

DATE: March 11, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$282,000	÷	\$294,900	x	30 points	=	28.69

Evaluation Team Comments:

Score totaled above.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Global Reach Strategies, Inc.

DATE: March 11, 2025

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Office of State Procurement Services as part of your contract award selection documents.

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Eric Weidman

Names of Evaluators: Charlotte Mace, Ben Sturtevant, Eric Weidman

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Appendix B (responsible Bidder Certification))	x	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	18
Section III. Proposed Services	40	24
Section IV. Cost Proposal	30	28.2
<u>Total Points</u>	<u>100</u>	<u>70.2</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Global Reach Strategies, Inc.

DATE: March 11, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- Requirements met

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Global Reach Strategies, Inc.

DATE: March 11, 2025

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	30	18

Evaluation Team Comments:

I. Overview of Organization

- CA-based firm with experience in cannabis-related social equity initiatives.
- Bidder's statement of qualifications is minimally developed.
- Policy development, business support, and workforce training experience. The last two are relevant to the RFP.
- Data-driven approach planned.
- Previous experience was with Daly City (misspelled by the bidder in the proposal), CA on a cannabis social equity program.
- Previous experience related to economic development and a cannabis social equity program with the City of Richmond.
- Prior projects do not demonstrate business development or grant administration.
- Workforce development experience is not clear.
- Social equity initiatives have partial alignment with RFP-related legislation and impacted communities.
- Proposed stakeholders not identified.

II. Subcontractors (if applicable)

- none

III. Organizational Chart

- Included
- Diversity in the organizational chart with business, social policy, and IT support (portals, digital marketing).
- Project manager has a PhD with a project execution and compliance background.
- Five individuals will work on the project. Unfortunately, skillsets do not include business development.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Global Reach Strategies, Inc.

DATE: March 11, 2025

IV. Litigation

- none

V. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot included.
- Financial viability is adequate

VI. Licensure/Certification
N/A

VII. Certificate of Insurance

- Provided - current

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Global Reach Strategies, Inc.

DATE: March 11, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	24

Evaluation Team Comments:

III. Proposed Services

A. Services to be Provided

- Proposed services: The plan to work closely with the commissioner's office to develop the program is positive.
- Proposed services include developing a PDF guide - helpful for businesses.
- Plans for virtual and in-person workshops.
- Positive plans to align with SCORE, SBDC, and local financial institutions could be beneficial – this is good.
- Utilizing a digital grant portal is smart.
- 1:1 group and technical assistance is planned. Would that be just for grant awardees or a larger audience?
- Significant rewriting of the text of FRP without demonstrating a specific approach and expertise.
- Grant program design lists some relevant tasks, but the descriptions are generic with little evidence of prior experience related to businesses.

B. Implementation – Work Plan

- Deliverables List provided
- The work plan aligns with the RFP Services provided.
- Services listed didn't go into detail. Overall, not a real detailed plan with specifics.
- The work plan was presented in a nice table format.
- Plan to use "subcontracted business advisors," yet none are listed in the subcontractor section. This is not okay.
- Overall, the proposal has some fine points, but a lack of experience is evident.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Global Reach Strategies, Inc.

DATE: March 11, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$282,000	÷	\$300,000	x	30 points	=	28.2

Evaluation Team Comments:

Score totaled above.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Roads Consulting Group

DATE: March 11, 2025

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SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Eric Weidman

Names of Evaluators: Charlotte Mace, Ben Sturtevant, Eric Weidman

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Appendix B (responsible Bidder Certification))	x	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28
Section III. Proposed Services	40	35
Section IV. Cost Proposal	30	28.2
<u>Total Points</u>	<u>100</u>	<u>91.2</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Roads Consulting Group

DATE: March 11, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Requirements met.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Roads Consulting Group

DATE: March 11, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	28

Evaluation Team Comments:

- I. Overview of Organization
 - National firm with Boston-based headquarters brings significant program management and business assistance experience.
 - Multilingual team. Good prior experience with workforce development and training as well as some grant experience, though not with direct administration.
 - Experience working with SBDC and minority-serving organizations.
 - Previous projects included the City of Lynn business incubator, a small business credit initiative for the State of Washington, and a small business revitalization project for the City of Revere.
 - Overall, a strong track record of performance with multiple certifications and awards ex. U.S. Small Business Administration Award- 2024 Minority-Owned Small Business of the Year and certification by the City of Boston as a Minority Business Enterprise.
 - A strength of the organization is the size (~25) and diversity of the firm, with a lot of support and specialized staff.
 - Multilingual and culturally competent staff.
 - The firm has previously conducted entrepreneurial training, financial literacy workshops, and one-on-one business mentorship programs.
 - Experience does not showcase significant business development projects.
 - Positive - the previous project Roads Consulting did for Lynn, MA "Business of Hard Knocks", a training program on entrepreneurship formally incarcerated individuals is directly relevant.
 - In general, previous experience is relevant to RFP.
 - Overall, the weak point in this proposal is the lack of experience with grants. They describe themselves as having grant administration experience, but the experience described in the three sample projects listed does not include designing or administering grant programs, but other grant-related tasks, such as providing grant readiness workshops and providing businesses with technical assistance, such as

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Roads Consulting Group

DATE: March 11, 2025

helping them apply for grants. But this is different from actually being involved in the grant design, scoring, and administration process.

II. Subcontractors (if applicable)

- None.

III. Organizational Chart

- CEO Dr Jose Perez and 22+ staff (org chart may not be updated)
- The chart is extensive, and it is not completely clear who will be working on the project.

IV. Litigation

- None.

V. Financial Viability

- Financial viability is adequate.
- Dun & Bradstreet Business Information Report Snapshot provided -good ratings

VI. Licensure/Certification

- N/A

VII. Certificate of Insurance

- Included - current

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Roads Consulting Group

DATE: March 11, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	35

Evaluation Team Comments:

III. Proposed Services

A. Services to be Provided

- Proposed “approach will be data-driven, culturally responsive, and results-oriented, aligning with the equity and economic empowerment goals outlined in H.P. 972 - L.D. 1517.” -It is apparent that the bidder looked at the statute.
- Proposed services are well-organized and nicely designed.
- Well thought out and with wide-ranging services proposed that align with the goals of this program.
- Technical assistance is part of the plan with an online portal and one-on-one assistance to businesses.
- Local business support organizations are mentioned in the proposal but without specific examples.
- Data-driven approach, culturally responsive methods.
- Roads Consulting Group refers to engaging with DOL which aligns well with the RFP and statute.
- Overall, a good proposal that aligns well with what we’re trying to do.
- Takeaway- the bidder understands what they hope to do throughout the contract.
- Strong proposal with staff who have relevant skillsets and experience relevant to RFP.

B. Implementation – Work Plan

- Deliverables List included in chart form
- Work Plan divided into six phases, each with a different manager.
- The Work Plan plans for swift program implementation.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Roads Consulting Group

DATE: March 11, 2025

- A project manager would oversee tasks following a “results-oriented” approach.
- A well-designed team with a designated financial assistance coordinator, a business development lead (with experience), and a compliance and policy specialist.
- Overall, there is a lot of alignment with the RFP.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Roads Consulting Group

DATE: March 11, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$282,000	÷	\$300,000	x	30 points	=	28.2

Evaluation Team Comments:

Score totaled above.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Ryse Local Ventures, LLC

DATE: March 11, 2025

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Office of State Procurement Services as part of your contract award selection documents.

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Eric Weidman

Names of Evaluators: Charlotte Mace, Ben Sturtevant, Eric Weidman

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Appendix B (responsible Bidder Certification))	x	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	21
Section III. Proposed Services	40	35
Section IV. Cost Proposal	30	29.68
<u>Total Points</u>	<u>100</u>	<u>85.68</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Ryse Local Ventures, LLC

DATE: March 11, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Requirements met.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Ryse Local Ventures, LLC

DATE: March 11, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	21

Evaluation Team Comments:

I. Overview of Organization

- Economic justice consulting firm based in Washington, D.C.
- Started in 2019 by CEO Dr. Brianna Cornelius
- Experience working with small businesses, working with CEI Maine on equitable lending and strategies for people of color in ME
- Strong connections to previous work in ME and local colleges. Business experiences looked in general alignment
- Positive- previous experience with black business owners in MS is relevant.
- Positive- previous experience working with CEI in evaluating investment strategy for business owners of color (direct relevant experience).
- Negative- previous project description for ME DHHS (Office of Family Independence) is incomplete/in error. Bidder failed to provide a project description for this work but instead used a portion of the CEI description.
- Other inconsistencies in the proposal: There is mention one of their team members has deep experience in the south. Is this targeted for Maine demographics and this specific project? Similarly, there was mention of a team member with lived experience in NC. The connection to this project should be specified.

II. Subcontractors (if applicable)

- Molly Bashay – Senior Policy Consultant, Dr. Brianna R. Cornelius – Senior Culture & Facilitation Advisor, Jennifer Patel – Project Manager, and at least one unnamed support staff member is being hired for this project.
- Subcontractors are subject matter experts, but it is unclear whether they were consultants or employees.
- Subcontractors have good experience, and the included resumes are helpful.

III. Organizational Chart

- Included org chart.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Ryse Local Ventures, LLC

DATE: March 11, 2025

IV. Litigation

- none

V. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot
- Business risk is reported as Moderate-High. A note from the bidder about the accuracy of Dun & Bradstreet report is documented.

VI. Licensure/Certification

- N/A

VII. Certificate of Insurance

- Included – current.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Ryse Local Ventures, LLC

DATE: March 11, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	35

Evaluation Team Comments:

III. Proposed Services

A. Services to be Provided

- A detailed list of proposed services is provided.
- The bidder is familiar with DECD and mentioned similar documents to currently generated resource summaries.
- Implementation of seed grant is planned.
- The plan looked comprehensive.
- A wide-ranging outreach strategy is planned in partnership with local organizations.
- Connections to Maine SBDC is a foundation for a technical plan with support for new businesses highlighted.
- Seed grant looked promising with planned funding awards by August, resulting in a quick turnaround.
- The balanced plan calls for a strong start from the beginning.
- Proposed services like PDF resource guide stood out as positive.
- Good description of outreach strategy, although it is unclear why there were marked contingency funds in the grant program.

B. Implementation – Work Plan

- Deliverables List -included.
- Workplan included.
- Concern - some work is planned for completion by support staff they have yet to hire.
- Includes solid details and description.
- Scope and Implementation sections are well constructed.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: Ryse Local Ventures, LLC

DATE: March 11, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$282,000		\$285,000	x	30 points	=	29.68

Evaluation Team Comments:

The score is tabulated above.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: UPLEVEL Management

DATE: March 11, 2025

Instructions: The purpose of this form is to record all evaluation notes and scoring that is obtained through consensus discussions among the full evaluation team for this Request for Proposals (RFP) process. The RFP Coordinator or Lead Evaluator should complete this form and maintain the only copy. This form should reflect the full team's consensus evaluations, and this form is **not** meant to take the place of individual evaluation notes, which are still required from each member of the evaluation team. A separate form is available for individual evaluation notes. Please submit a copy of this document to the Office of State Procurement Services as part of your contract award selection documents.

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Eric Weidman

Names of Evaluators: Charlotte Mace, Ben Sturtevant, Eric Weidman

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Appendix B (responsible Bidder Certification))	x	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	20
Section III. Proposed Services	40	30
Section IV. Cost Proposal	30	28.44
<u>Total Points</u>	<u>100</u>	<u>78.44</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: UPLEVEL Management

DATE: March 11, 2025

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Requirements met.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: UPLEVEL Management

DATE: March 11, 2025

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	20

Evaluation Team Comments:

I. Overview of Organization

- Business is headquartered in Chicago with a strong mission statement.
- Some of UPLEVEL's expertise seemed to apply, while other previous experience was not applicable.
- Previous experience with government contracting and grant administration opportunities for minorities is positive.
- Significant experience in health-related projects. Would rather see business experience.
- Bidder states, "Our experience spans workforce development, small business growth, technical assistance, and access to capital, ensuring that businesses in impacted communities receive comprehensive support to scale and sustain their operations." - Listed experience (4 projects) do not have alignment with goals of RFP.
- Talked about prior experience, didn't see a lot of alignment with our RFP
- Positive experience included prior work with SCORE and a business pitch competition.
- Overall, the listed experience is with mentoring programs and pitching rather than business development
- Not a lot of direct business experience.
- Their list of previous projects is mostly healthcare. Great projects, but would like to see more examples of projects involving business development. Vendor work is good, but tangential.
- One previous project was work for SCORE that involved seed funding, where they had to evaluate 100 applications from entrepreneurs. This is good experience. Although there were only three "winners." So perhaps it was more of a contest than a grant program?

II. Subcontractors (if applicable)

- N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: UPLEVEL Management

DATE: March 11, 2025

III. Organizational Chart

- Provided. Project assignments noted. Team members' resumes and experience were helpful.
- The CEO's resume is very impressive, though mostly focused on healthcare.

IV. Litigation

- None.

V. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot included.
- Moderate to high risk.

VI. Licensure/Certification

- N/A

VII. Certificate of Insurance

- Provided – current.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: UPLEVEL Management

DATE: March 11, 2025

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	30

Evaluation Team Comments:

III. Proposed Services

A. Services to be Provided

- Proposed services planned for alignment with MJRP, workforce development plan, and current labor demands. MJRP alignment not necessary, per se.
- Although planned alignment with DOL is mentioned, details on services were not provided.
- Some of the “Assessments for Career and Business Development” planned are geared toward job seekers and not business owners.
- Planned connections with DECD, SBDC, and potentially MTI are appropriate.
- Planned work with stakeholders and using a marketing plan was positive.
- A balanced approach to providing services is proposed and the technical assistance offerings look appropriate.
- Highlighting workforce development program connections in Maine is strong.
- Reviewers appreciate the attempt to understand, albeit slightly incorrectly, State of Maine specific programs.

B. Implementation – Work Plan

- Deliverables List – embedded in proposed services plan.
- Program Implementation (Business Services, Seed Funds) targeted for months 7-9.
- A section of their proposal is called “Maine Jobs & Recovery Plan Alignment.” Not sure why as this isn’t a MJRP program.
- Bidder presents an overall strong plan

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: UPLEVEL Management

DATE: March 11, 2025

- Ultimately, they have a good approach to services and organizing a work plan, but questions remain about the organization's experience in implementing these approaches.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER: UPLEVEL Management

DATE: March 11, 2025

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$282,000	÷	\$297,500	x	30 points	=	28.44

Evaluation Team Comments:

Score totaled above.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Acadia Capital Management L3C

DATE: 3/4/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- CEO, Dr. Brien Walton, African American corporate lawyer, Master's in Workforce Development, and current chair of the Maine Venture Fund. Member of an impacted community has experience in economic development, strategic planning, and community engagement. Dr. Walton is also the Director of Husson University's Center for Family Business
- Organization has applicable experience: Developing and managing workforce development programs for marginalized communities; providing technical assistance, mentoring, and funding opportunities for socially and economically disadvantaged individuals (SEDI) entrepreneurs; collaborating with state and local governments to implement economic development initiatives; designing and administering grant programs for business startups and expansions. Has CDFI CDE credentials.
- Projects: Domestic Trade and FAME Thrive program, which were both part of Maine Jobs and Recovery programming; MVF.

2. Subcontractors No

3. Organizational Chart Yes (7-person staff led by CEO)

4. Litigation No

5. Financial Viability Yes, D&B paperwork included; risk rating: moderate

6. Certificate of Insurance Yes

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Acadia Capital Management L3C

DATE: 3/4/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- Plan and deliverables align with RFP requirements. CEO to serve as project manager. Deliverables:
 1. Advisory Committee Management: Establish structured member selection criteria, schedule quarterly meetings.
 2. Program Materials: Develop detailed business development guides, application toolkits.
 3. Outreach Plan: Identify community engagement strategies, design multi-platform outreach campaigns.
 4. Technical Assistance Plan: Define mentor-coach matching protocols, develop virtual resource hubs.
 5. Grant Program Design & Implementation: Develop a transparent evaluation framework, allocate funding based on competitive criteria.
 6. Legislative Report: Compile performance data, document policy recommendations.
 7. Kick-Off and Progress Meetings: Set clear meeting objectives, track action items.
- 2. Implementation – Work Plan
 - Plan and schedule included w/ pertinent details and grant chart graphic

Notes: This Maine-based entity has worked closely on business development projects with DECD and FAME in the past, including evaluation of startup and small business applicants of finance/grant opportunities from affected communities this program intends to serve. The CEO is on the Board of Maine Venture Fund and is heavily engaged in Maine's startup/innovation economy. Additionally, they have worked on programming from the Maine Jobs and Recovery Plan.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Acadia Capital L3C

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “As an African American corporate lawyer with a Master’s in Workforce Development and current chair of the Maine Venture Fund, our CEO, Dr. Brien Walton, is a member of an impacted community and brings a wealth of experience in economic development, strategic planning, and community engagement to the Economic Development Social Equity project. With a firsthand, deep understanding of the needs of impacted communities and experience developing innovative solutions to help elevate those communities, we are committed to enhancing the economic growth of Mainers, improving livelihoods, and creating jobs. Dr. Walton’s leadership of Acadia Capital Management L3C, as well as serving as the Director of Husson University’s Center for Family Business (Bangor), has equipped him with the necessary skills and resources to effectively manage this initiative.” Strong expertise.
- List of specific subject matter expertise provided, including: (1) workforce development programs for marginalized communities; (2) collaborating with governments; (3) providing TA; (4) designing and administering grant programs.
- Certified project manager on staff – this is good
- Similar experience/projects for both DECD and FAME – this is a plus
- Description of qualifications and experience, overall, was strong with specific, relevant details

2. Subcontractors (if applicable)

- None

3. Organizational Chart

- Provided – organized and easy to understand; small staff

4. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Acadia Capital L3C

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- None

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot information properly included
- \$13,000 credit availability; overall business risk = low to moderate
- Company is 6 years old

6. Licensure/Certification

- NA for this RFP

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Comprehensive project plan with specific methods listed (e.g., data gathering, as well as resources, implementation, and outcomes
- Outcomes are general and not overly specific to the project
- Other tasks are described, including project implementation and stakeholder consultation
- Other tasks described include legislative report and monthly program meetings

2. Implementation – Work Plan

- Deliverables List is provided, with several good examples of specific deliverables related to business development and design of the grant program – this is a strong section
- Brien Walton is the primary person for most of the work; his expertise is well described throughout, and impressive, particularly with business experience and startups.
- In the timeline, it shows a mid-year legislative report.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Acadia Capital L3C

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Notes: overall, a very strong proposal that meets the requirements of the RFP; the firm has the skills and expertise necessary to do the project.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Acadia Capital Management L3C

DATE: March 4, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Dr. Brien Walton / CEO
- Wealth of experience in community/economic development with both professional connections and personal experiences
- Current chair of the Maine Venture Fund and Director of Husson University's Center for Family Business
- Subject matter expertise and experience "Providing technical assistance, mentoring, and funding opportunities for socially and economically disadvantaged individuals (SEDI) entrepreneurs"
- Experience with grant disbursements for DECD and FAME
- The organization has experience "providing technical assistance, mentoring, and funding opportunities for socially and economically disadvantaged individuals (SEDI) entrepreneurs."
- Previous work helping "minority entrepreneurs", supporting "business innovation and mentorship"
- Work helping diverse businesses, organizations, individuals, and "impacted communities"

2. Subcontractors (if applicable)

- N/A

3. Organizational Chart

- Small organization noted with three professionals (Dr. Walton, Dr. Ezell, Ms. O'Toole)

4. Litigation

- none

5. Financial Viability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Acadia Capital Management L3C

DATE: March 4, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- Dun & Bradstreet Business Information Report Snapshot information indicates low-moderate risk and no areas of concern.

6. Licensure/Certification

- Certified as a Community Development Entity by the U.S. Treasury

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Systematic approach planned with research and customized testing
- Will national best practices translate into success for Maine's communities and demographics?
- Regular consultation and planning to adapt to changes in the program rollout = positive
- Plan for monthly progress reports and legislative updates will be data-heavy and comprehensive

2. Implementation – Work Plan

- Deliverables List is provided
- What digital marketing tools or agencies will be used to conduct outreach and engagement activities?
- Mentor-coach model may prove to be effective for small business owners. No specific organizations are mentioned although the organization has provided extensive examples of prior experience working with relevant Maine organizations.
- Dr. Walton will be solely responsible for the 12-month work plan actions for this project with the assistance of a project manager
- The plan for seed funding is appropriate to the grant deliverable.
- Plans for meetings and reporting are well-documented.

Notes: Considerable experience and professional expertise. Overall, a very strong proposal.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: 3/4/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Black Owned Maine (BOM) is a Maine-based, Black-led nonprofit organization with a proven track record in business development, social equity advocacy, and technical assistance for historically marginalized communities.
- Since 2020, BOM has established and administered programs that align closely with the goals of the Social Equity Program, specifically by providing direct business support, culturally relevant training, and economic development resources to impacted communities across the state.
- Has served over 70% of Maine's black-owned businesses.
- A multilingual, culturally competent advisory team provides training in business formation, financial management, tax compliance, and digital literacy.
- Has helped clients secure more than \$600K grant funds
- Contributed to advocacy efforts to address economic disparities and elevate Black entrepreneurs' voices in policy discussions at state and municipal levels.
- Experience preparing impact reports, policy recommendations, and public testimony to inform decision-makers about business equity issues.
- Projects include DECD Spoke and Hub to provide business and technical assistance to minority business owners in Cumberland/Androscoggin counties; Good Shepard Food Bank (Two projects -- 2 and 3 -- appear identical in scope and services provided)

2. Subcontractors (if applicable)

- Lorne Agency of Colorado to supply marketing, creative services.
- Round Table IT consultant to supply technical support.

3. Organizational Chart -Yes

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: 3/4/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

4. Litigation -None
5. Financial Viability? applied for DUNS #, awaiting approval. Will share financials upon request

II. Proposed Services

1. Services to be Provided—Y, aligns with requirements
 - CEO experienced in Agile project management, tech-driven workflow
 - Program development: Leaning on subcontractor Lorne for outreach, communication and marketing, 35-50 applications to be processed with 15 expected to be awarded.
 - Coordination with stakeholders, DECD on reporting, progress meetings.
2. Implementation – Work Plan Y

Notes: Experienced working with DECD / MJRP, and social equity programming in impacted communities.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “Black Owned Maine (BOM) is a Maine-based, Black-led nonprofit organization with a proven track record in business development, social equity advocacy, and technical assistance for historically marginalized communities. Since 2020, BOM has established and administered programs that align closely with the goals of the Social Equity Program, specifically by providing direct business support, culturally relevant training, and economic development resources to impacted communities across the state.”
- Key areas of expertise include: (1) Project Management and Advisory Committee Coordination; (2) Project Development and Administration; (3) Technical Assistance and Workforce Development; (4) Grant Fund Design & Implementation; and (5) Legislative and Policy Engagement
- “Culturally relevant program materials” – this is good; multilingual team – also good, although this wasn’t a requirement of the RFP
- “BOM has successfully helped businesses secure over \$600,000 in grants and loans, making us well-positioned to develop and administer the proposed seed fund program.” This is a good and specific experience metric
- Their description of Unique Qualifications & Competitive Advantage is strong. Their list includes: “**Established Trust & Community Relationships** – BOM’s grassroots, community-driven approach ensures strong engagement with impacted communities,” as well as “**Technology & Digital Innovation** – Our team has developed a digital resource hub, training materials, and process automation tools to enhance efficiency in business support services.”
- Overall, this section is strong.
- Hub & Spoke project for Maine – “Culturally Responsive, Trauma-Informed Approach” – this is relevant experience

2. Subcontractors (if applicable)

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- This list is a bit confusing, as it's difficult to tell if there is one proposed subcontractor or two
- J. Lorne Studios (branding) and Jason Giles; does Jason Giles work at J. Lorne Studios?

3. Organizational Chart

- Danica 'Rose' Barboza -CEO – will be working on the project (mostly project management and strategic oversight; as well as legislative report)
- Abedom Gebreyesus – Chief of Strategy and Innovation (will be responsible for technical and security compliance – what does this mean?); “managing cloud-based project management and communication systems such as Monday.com and Google Workspace”; the RFP specifically says that Google Docs cannot be used. So this shows poor reading of the RFP
- Business Consultants (2) – who have not been hired yet; there seems to be a risk in waiting for these two hires, which could take some time; this person will be responsible for the direct support aspects of the project (e.g., technical assistance), including helping with LLC formation, application process support, and social media outreach
- Firdaws Hakizimana – marketing coordinator; will focus on program visibility and marketing
- Overall, the team is strong except for the lack of the two business consultants, which will be critically needed for successful execution of this project.

4. Litigation

- None

5. Financial Viability

- Dun & Bradstreet number signed up for, but they are a new registrant so there is understandably limited information.
- According to the Dun & Bradstreet information, they registered with the SOS's Office in July 2020.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

6. Licensure/Certification

- NA for this RFP

7. Certificate of Insurance

- Included, as required – looks like they perhaps obtained insurance just before the RFP due date

II. Proposed Services

1. Services to be Provided

- Project management strategy prominently features Google platform, though our RFP specifically says we don't want Google (because State of Maine does not use Google platforms).
- "meeting notes and minutes are automatically uploaded to the website, promoting transparency and ease of access." I'd rather they indicated that recordkeeping and public access will be done in accordance with State of Maine laws and Advisory Committee decisions, rather than their suggestions.

2. Implementation – Work Plan

- The proposal goes into detail as to the number of applicants and dollar amounts, although the program has not been designed yet or announced publicly; this is a bit contrary to the way public grant programs need to be run;
- "By maintaining a trauma-informed, culturally appropriate framework, BOM ensures that its outreach and support strategies address the systemic barriers faced by impacted communities, fostering long-term success and economic inclusion." This is good.
- They suggest two legislative reports – at the end of Year 1 and Year 2; but this isn't what the statute requires.
- Detailed, month-by-month timeline is thorough and well thought out.
- "Conduct a bi-annual audit of its outreach and technical assistance strategies, using data and feedback to adjust its approach where necessary." I can see how this might be helpful, but it was not included in the RFP as a necessary task.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

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BIDDER NAME: Black Owned Maine

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- Work plan establishes a monthly cadence for the Advisory Committee meetings, though this isn't in the statute and it should be up to the Committee to determine the meeting frequency.
- Overall, the work plan had some good specifics which indicates that the BOM has knowledge of how a project like this can succeed through effective project management.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: March 4, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Maine-based nonprofit organization serving 70% of the Black-owned businesses in Maine.
- Experience in providing technical assistance to Maine business owners.
- Multilingual staff, grassroots approach
- Experience with DECD contracts and Maine community organizations.

2. Subcontractors (if applicable)

- J. Lorne Studios Denver, Colorado - Jason Giles

3. Organizational Chart

- Provided. CEO Danica 'Rose' Barboza, CSI Abedom Gebreyesus, 2x Business Consultants (to be hired), and Marketing Coordinator Firdaws Hakizimana will comprise the project staff.

4. Litigation

- none

5. Financial Viability

- Dun & Bradstreet Business Information Report submitted.
- Incorporated in 2020
- Information Snapshot not populated with data.

"We signed up for our DUNs number to comply with the requirements of this bid so it does not show any financial information. We can provide financial statements upon request."__

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: March 4, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

6. Licensure/Certification

- N/A for this RFP

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Certified Project Management leadership in place for the project as well as managed IT support from Round Table Technology.
- Program development will draw upon BOM's social media website and network.
- Tech assistance will be provided to business owners with tax credit education and business compliance support included.
- Anticipated project audience = 35-50 entrepreneurs from impacted communities with 15 businesses awarded \$10,000 in grants
- Significant counseling and technical assistance to be provided in advance of financial wards
- Research and consulting with stakeholders will refine the strategies to be implemented
- Legislative reporting plans are developed as well as planned coordination with DECD

2. Implementation – Work Plan

- Deliverables- List provided
- Will the planned business consultants be hired and onboarded early enough in the work plan timeline (planned for month #2)?
- Interesting – first round of seed funds to be awarded in Month 10.
- Positive – tax credit education will occur before the end of the calendar year with ample time to prepare for tax filing.
- Question – Will there be measurable success earlier in the timeline to validate a renewal period and/or justify continued legislative funding?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Black Owned Maine

DATE: March 4, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Notes:

- Positive – “Business Advisors will play a key role in providing 1-on-1 support, ensuring that applicants are well-prepared, and that success is equitably distributed” ensuring all applicants receive assistance, not just the 15 awardees
- Will the proposed hiring of two business consultants be involved with program planning and launch?
- Overall, some good experience but concern over organizational capacity.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Empress Rules Equity Consulting

DATE: 3/4/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Empress, located in Oregon, provides comprehensive Diversity, Equity, and Inclusion (DEI) consultancy services focused on strategic planning, workforce development, community engagement, and policy transformation. CEO has MBA and also attended Harvard Business School.
- Leadership in Comparable Projects:
 - Developed community-centered recommendations for diverse community inclusion in Travel Oregon's operations.
 - Executed Energy Trust of Oregon's equity audit, leading to designing a program that invested \$200,000 in reparations for BIPOC entrepreneurs.
 - Developed the "Prosper Portland Culture Change Road Map," setting a precedent for equity in economic practices.
 - Success indicators, including participant satisfaction rates surpassing 98%.
 - Fostered institutional commitment to equity, impacting policy direction and cultural transformation.
 - Portland Community College Diamond Alumni Award
- Projects: Prosper Portland, Energy Trust of Oregon, Portland Children's Levy

2. Subcontractors (if applicable)

- 3 subs – Breaking Through; Elite Renewable; Mamaberry

3. Organizational Chart, Yes, included

4. Litigation No

5. Financial Viability, No Dun and Bradstreet listing, but firm claims to be well funded with assets needed to do the work.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Empress Rules Equity Consulting

DATE: 3/4/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

6. Certificate of Insurance - Yes

II. Proposed Services

1. Services to be Provided

- Structured Meeting Agendas: Generate and disseminate detailed, public-compliant agendas ahead of Advisory Committee meetings.
- Documented Program Insights: Develop and provide accessible .pdf resources responding to community needs.
- Outreach Strategy Advancement: Lead the design and realization of our strategic outreach plan.
- Technical Assistance Plan Leadership: Spearhead the creation of equitable business advisory services.
- Grant Program Design and Execution: Lead transparent grant application, selection, and support processes.
- Funding Deployment Leadership: Manage and implement all aspects of funding distribution

2. Implementation – Work Plan - Yes

Notes: Prosper Portland roadmap projects \$465 million economic impact over 4 years by 134 businesses (54 women-owned; 29 black-owned). Oregon-based. No experience with Maine Jobs and Recovery programming.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Empress Rules Equity Consulting

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “Our firm specializes in providing comprehensive Diversity, Equity, and Inclusion (DEI) consultancy services focused on strategic planning, workforce development, community engagement, and policy transformation. We prioritize healing and systemic change aimed at dismantling dominant cultural paradigms and promoting equity across various sectors.”
- Previous experience in community engagement and social equity training (not directly relevant); policy development and organizational assessments (not directly relevant); workforce development and business support (applicable); project management and stakeholder consultation (applicable)
- **“Holistic Approach and Tools:** We incorporate an integrated methodology combining gamification, mentorship, innovation hubs, and performance dashboards to engage teams proactively.” Not sure gamification would be relevant here, but would be happy to be proved wrong on this; which “teams” are they referring to here?
- **“Deep Commitment to Inclusivity:** Our operations revolve around promoting equity and facilitating long-term transformation within the organizations and communities we serve.” The equity conversation is relevant to this project, yet the transformational/organizational change isn’t as relevant as the scope of work does not touch upon DECD or State government in general.
- Previous work for Travel Oregon with BIPOC populations; this is tangentially relevant to business development
- Previous Projects:
 - Culture Change Roadmap for Prosper Portland (not directly relevant) – organizational readiness, cultural transformation
 - Comprehensive Equity Assessment for Energy Trust of Oregon (not directly relevant, although the customer engagement work is related to the stakeholder engagement task in the RFP).
 - Portland Children's Levy Community Engagement Initiative – to improve outcomes for children (not directly relevant, although

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RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Empress Rules Equity Consulting

DATE: March 3, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

perhaps a bit more relevant than the other projects listed);
“Identified high demand for culturally responsive programs and support, emphasizing bilingual services and equity-driven staffing across service areas.”

2. Subcontractors (if applicable)

- Breaking Through Facilitation (Danise Elijah) – experience and expertise is primarily menstrual health equity; leadership in comparable projects is listed as: “Danise has led projects extensively, focusing on strategic social equity methodologies and statewide health education initiatives, cultivating environments that promote understanding and equity.” This may be comparable with respect to certain equity elements, but overall it is primarily a health care project, so not as relevant as perhaps they are hoping, as this RFP is focused on business development and grant design/administration.
- Elite Renewable Energy Consult (Nichet Newsome): “At EREC, Nichet initiated partnerships aimed at creating equitable employment opportunities in renewable energies while promoting inclusion within construction and trades industries.” Previous experience is mostly related to the renewable energy industry and workforce development; while this is good experience, it is only tangentially related to the scope of work we are seeking a consultant for in this RFP.
- MamaBerry Consulting (Paula Handberry): “In her social equity role, Paula implemented customized equity training programs that bridged communication gaps and strengthened community bonds within schools and organizations.” Similar feedback here with the other two previous subcontractors listed; skillset and expertise is not directly relevant to this economic development/business development project. Works seems to be mostly educational settings.

3. Organizational Chart

- CEO (Kheoshi Owens, MBA) has expertise in strategic problem-solving (not directly relevant) and cultural responsiveness (this is relevant)
- Kheoshi is a master facilitator, which could be useful for the Advisory Committee meetings for sure

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- Certification in Strategy Execution - **Harvard Business School**

4. Litigation

- “Empress Rules has never been involved in any type of litigation.”

5. Financial Viability

- “Please see the attached. Empress Rules has never engaged with Dun and Bradstreet, and we are concerned because this information on the snapshot not accurate as our accounts have never been connected to it, which is why there is so little information. We have never needed a Dun and Bradstreet report in our 8 years of business; however, we have ample access to assets, credit, and capital to carry out the scope of work.”
- Maximum Credit: \$7,500; overall business risk is MODERATE
- Business started in 2017

6. Licensure/Certification

- “There are no known licenses or certifications needed to provide the scope of proposed services. However, if we are selected, we would be happy to obtain a business license for the state of Maine, if needed.”

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- “Community Empowerment” – “Design and implement technical assistance frameworks, including workshops and mentoring programs tailored to community needs. Develop and distribute seed funding, creating inclusive criteria and transparent application processes.” This indicates that they have read the RFP and understand what it’s asking for.

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- A few of the tasks described aren't consistent with what the RFP asks for ("Implement healing initiatives through tailored programs addressing trauma and promoting resilience in affected communities") although adding tasks based on the consultant's subject matter expertise seems reasonable
- They refer to "legislative reports" although there will only be one.
- "Create and distribute structured agendas and follow-up documentation to keep stakeholders informed and engaged." Yes, this is good.
- "Manage seed funding program distribution, ensuring equitable and efficient allocation aligned with established criteria."
- Overall, the list of services seems commensurate with the services described in the RFP.

2. Implementation – Work Plan

- **"Community Identification:** Leverage demographic analysis to target impacted communities." Yes, this is good and will be needed.
- Specific leads and co-leads are identified for each task in the work plan, which is helpful.
- **"Engagement Methods Development:** Design engaging strategies tailored to specific community needs." This could have been more specific.
- **"Criteria Development:** Formulate inclusive funding application criteria." Like what? At least one example would have shown us their expertise in this area.
- **"Efforts Cataloging:** Map ongoing state initiatives to enhance partnerships." This was not in the RFP. They have previous experience auditing organizations for their equity programs, but that is not what this project is.
- **"Inquiry Readiness:** Prepare to address legislative questions with detailed responses." That's really solid; I like that – inquiry readiness. Great!
- **"Technical Assistance Plan Leadership:** Spearhead the creation of equitable business advisory services." Their proposal would have been strengthened with just a few examples to demonstrate their readiness to provide business technical assistance.
- "As we proceed through each phase of our timeline, our team remains agile and responsive, ensuring that Maine's communities

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are not only included but centered in the policymaking process.”
This is a solid sentiment, but the statute does not mention policymaking or allow room for future policy. Legislative report is only to include progress and impact on the program, not policy recommendations.

- Overall, strong writing and good detail in this proposal.

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RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Empress Rules Equity Consulting

DATE: March 4, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Consulting firm founded in 2027 by Kheoshi Owens in Portland, OR
- Previous experience “designing and delivering impactful social equity training programs.”
- Experience “in tailoring strategic plans and facilitating workforce development programs that prioritize diversity, empower marginalized entrepreneurs, and support small business growth.”
- “We incorporate an integrated methodology combining gamification, mentorship, innovation hubs, and performance dashboards to engage teams proactively.”

2. Subcontractors (if applicable)

- Name: Breaking Through Facilitation Address: 3604 NE 15th Ave, Portland Oregon 97211 Phone Number: 971-409-2220 Contact Person: Danise Elijah
- Name: Elite Renewable Energy Consult Address: 12434 SE Schiller St, Portland, OR 97236 Phone Number: 971-352-9871 Contact Person: Nichet Newsome
- Name - MamaBerry Consulting Address: 2913 NE Killingsworth St, Portland, Or 97211 Phone Number: 971 – 263 - 5542 Contact Person: Paula Handberry

3. Organizational Chart

- Organizational; chart provided.
- Empress Rules is managed by Kheoshi Owens. Three subcontractors (listed above) will comprise the team led by Kheoshi Owens.

4. Litigation

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EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- none

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot information provided
- Business started in 2017
- Moderate credit risk
- No concerning data

6. Licensure/Certification

- N/A for this RFP

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- The project management team will organize stakeholder identification, advisory committee establishment, meeting organization, and legislative oversight.
- Community outreach, technical workshops, and mentoring programs are planned but with few details
- What will be the method of distribution for business supports?

2. Implementation – Work Plan

- Deliverables List included
 - “-Structured Meeting Agendas: Generate and disseminate detailed, public-compliant agendas ahead of Advisory Committee meetings.
 - Documented Program Insights: Develop and provide accessible .pdf resources responding to community needs.
 - Outreach Strategy Advancement: Led the design and realization of our strategic outreach plan.
 - Technical Assistance Plan Leadership: Spearheaded the creation of equitable business advisory services.

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

-Grant Program Design and Execution: Lead transparent grant application, selection, and support processes.

-Funding Deployment Leadership: Manage and implement all aspects of funding distribution.”

- Timeline for implementation includes a period for demographic analysis, meetings, and committee organization in the first few months. Community-facing activities planned by Summer 2025
- Implementation of the work plan minimally addresses business-specific needs and related supports
- Preparations for legislative support and related inquiries are well-planned.

Notes:

N/A

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Global Reach Strategies, Inc

DATE: 3/6/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- California-based firm with a robust history of effectively designing, managing, and implementing social equity initiatives, particularly within the cannabis sector.
- Experience in policy development, business support, and workforce training
- Approach is data-driven, community-centered, and designed to maximize equitable access to economic opportunities.
- Projects: City of Daly City's cannabis social equity program; City of Richmond as Chair of the Economic Development Commission and Cannabis Subcommittee; Peered Reviewed Published Study (4-year project)

2. Subcontractors -not using any

3. Organizational Chart included -Yes

4. Litigation -No

5. Financial Viability -included information

6. Certificate of Insurance -Yes

II. Proposed Services

1. Services to be Provided

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DATE: 3/6/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- Advisory Committee: GRS will work closely with the Commissioner's Office to develop a list of potential Advisory Committee members.
- Program Materials: GRS will compile a comprehensive resource guide in PDF format that includes funding resources, technical assistance opportunities, and outreach materials.
- Outreach Plan: GRS will utilize social media, community forums, digital newsletters, and partnerships with local organizations to disseminate outreach information.
- Technical Assistance Plan: GRS will develop a customized technical assistance framework, leveraging partnerships with Small Business Development Centers (SBDCs), Service Corps of Retired Executives (SCORE), and local financial institutions.
- Grant Program Design and Implementation: GRS will utilize a user-friendly digital grant application portal, ensuring accessibility for impacted communities. We will create clear selection criteria and an evaluation committee.
- Legislative Report: GRS will compile quantitative and qualitative data, integrating findings from the program. The report will be drafted in Microsoft Word and formatted to legislative standards.
- Kick-Off and Progress Meetings: Regular meetings will be facilitated using Microsoft Teams or Zoom, ensuring real-time communication and tracking project milestones.

2. Implementation – Work Plan (included)

Notes:

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RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Global Reach Strategies

DATE: March 4, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “Our organization has a robust history of effectively designing, managing, and implementing social equity initiatives, particularly within the cannabis sector.” This is the extent of their statement of qualifications.
- The first project listed is spelled “Daily City,” then in the next section “Daly City.” This lack of attention to detail in a prominent part of their proposal is concerning. This project included: “cannabis social equity program, including conducting comprehensive equity assessments, stakeholder meetings, information sessions, and public forums.”
- Second project: “Led comprehensive initiatives for the City of Richmond as Chair of the Economic Development Commission and Cannabis Subcommittee.”
- This project: “Conducted a comprehensive, four-year study exploring racial capitalism and systemic barriers faced by African Americans entering the cannabis industry.”
- These previous projects are highly relevant to the RFP, except for the fact that they don’t seem to include business development or grant administration.
- “With extensive experience in policy development, program assessment, stakeholder engagement, and community outreach, we have demonstrated a clear capacity to foster economic opportunities and reduce barriers for historically impacted communities.”
- It would be good if they had included a full address (e.g., what state is Richmond in, for example?).
- In a later section of their proposal they say, “With extensive experience in policy development, business support, and workforce training, our team is uniquely positioned to implement a comprehensive and effective program that will empower impacted communities” (see Implementation-Work Plan document). But its

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DATE: March 4, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

not clear what previous experience they have with business support or workforce training.

2. Subcontractors (if applicable)

- “GRS will not use subcontractors for this project. All work will be conducted in-house by our experienced team to ensure consistency, efficiency, and adherence to our high standards of service delivery.”

3. Organizational Chart

- Org chart shows that five individuals will work on the project:
- Dr. Ayoka Nurse- Project Manager / Social Policy Analyst & Cannabis SME
- Natana McGriff, MBA -Grant Administrator
- John Medlock Jr, MPA - Outreach & Technical Assistance Coordinator: “Develops and implements outreach strategies to engage impacted communities; Provides educational resources and mentorship support.”
- Sabrina Smith Stakeholder - Engagement Specialist
- Miguel Nurse - IT Specialist
- Unfortunately, the roles and responsibilities of these individuals do not include business technical assistance, business development, or other business-related tasks/skill sets.

4. Litigation

- “We hereby confirm that Global Reach Strategies (GRS) has no current or past litigation cases within the past five (5) years in which we have been named as a party or have made payments as part of a settlement or decree. As such, no litigation disclosure list is applicable to our submission.”

5. Financial Viability

- Dun & Bradstreet report provided (limited info)
- overall business risk is MODERATE
- Business started in 2020

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BIDDER NAME: Global Reach Strategies

DATE: March 4, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

6. Licensure/Certification

- No specific requirements per the RFP, but they have listed the academic credentials of their team in this section.

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Method for Advisory Committee: "GRS will work closely with the Commissioner's Office to develop a list of potential Advisory Committee members." This is good.
- Program materials: "Ensure information is accessible and culturally relevant to impacted communities." Good.
- Outreach Plan: "GRS will utilize social media, community forums, digital newsletters, and partnerships with local organizations to disseminate outreach information." Perhaps it would have been good if they gave a few specific examples (e.g., type of local organization or community forum).
- Technical Assistance Plan: "GRS will develop a customized technical assistance framework, leveraging partnerships with Small Business Development Centers (SBDCs), Service Corps of Retired Executives (SCORE), and local financial institutions." This is essentially regurgitating what the RFP said. Which of their staff will provide "one-on-one business coaching for start-ups and entrepreneurs," which is on their task list? Based on their org chart, it's not clear that a member of their team has business advising experience. Or will they be relying on the partnerships previously listed? This isn't clear. Okay, they further say they will use: "Subcontracted Business Advisors," yet none are listed in the Subcontractors section. That's really too bad because one or two high-quality subcontractors with previous experience in business advising or business development could have helped to plug the obvious hole in their expertise, specific to what this RFP requires.
- For Grant Program Design and Implementation task, they list tasks specific to the grant portal, but don't talk at all about how they will

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BIDDER NAME: Global Reach Strategies

DATE: March 4, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

design the program or the elements that will be determined as part of this design (e.g., eligibility, min/max award thresholds, etc.). This leads me to think they haven't designed a grant program before.

"Develop an online grant application system using web portal.

Allocate \$150,000 in funding through a transparent and competitive process." Good.

- "Submit a final legislative report by December 15, 2026." Yes, very good. They must have read the statute.

2. Implementation – Work Plan

- Nice table of work plan, broken down by month and task.
- Inconsistent with their previous statement above about the legislative report being due 12/15/26, their legislative report task is listed as being accomplished by 12/25, so that's unfortunate.
- Overall, the proposal has some nice elements, but the inconsistencies and lack of demonstrated business experience, makes the proposal weak.

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Global Reach Strategies, Inc

DATE: March 5, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Organization “has a robust history of effectively designing, managing, and implementing social equity initiatives, particularly within the cannabis sector.”
- Bidder has experience implementing multiple social equity programs related to cannabis
- Organization has “extensive experience in policy development, program assessment, stakeholder engagement, and community outreach, we have demonstrated a clear capacity to foster economic opportunities and reduce barriers for historically impacted communities.”
- The business is a Richmond, CA-based consulting firm

2. Subcontractors (if applicable)

- N/A

3. Organizational Chart

- Dr. Ayoka Nurse Project Manager/Policy Analyst – Holds a PhD. in Public Administration; responsible for overall project execution and compliance.
- John Medlock, Jr. MPA - Outreach & Technical Assistance Coordinator – Holds a Bachelor's degree in Communications; responsible for program outreach and community engagement.
- Natana Mc Griff-Grant Administrator/Financial Compliance – Holds a Master's degree in Business Administration; oversees the grant program and funding compliance.
- Sabrina Smith-Stakeholder Engagement Specialist – Holds a Master's degree in Social Policy (Public Health); leads collaboration efforts with state agencies and community partners.
- Miguel Nurse – IT Specialist

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RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Global Reach Strategies, Inc

DATE: March 5, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

4. Litigation

- none

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot information provided
- Overall business risk = moderate
- Company is 4 years old

6. Licensure/Certification

- N/A for this RFP

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Advisory Committee
- Program Materials – PDF guide (may be helpful)
- Outreach Plan -Outreach calendar with virtual and in-person workshops – What is the frequency?
- Technical Assistance Plan - Positive connections planned with SCORE, SBDC, and potentially local financial institutions.
- Grant Program Design – The digital grant application portal should be user-friendly – pre-application workshops are a nice feature
- Legislative Report
- Kick-off and Progress Meetings

2. Implementation – Work Plan

- Deliverables List provided
- Print and digital resources to be designed. Logistics of dissemination uncertain.

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DATE: March 5, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- One-on-one and group technical assistance planned. Would this be for grant awardees or a larger population (not yet identified)
- Data collection, feedback, and implementation analysis is embedded throughout the timeline.

Notes: Connection to the cannabis sector in this project?

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Roads Consulting Group

DATE: 3/7/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Boston-based Roads Consulting Group, LLC (RCG) is a minority-owned firm dedicated to empowering small businesses through customized technical assistance designed to foster long-term growth and sustainability. Since its founding in 2017, RCG has supported over 2,300 small businesses nationwide with tailored solutions in financial management, marketing strategies, and business development.
- RCG has worked with public sector agencies, diverse urban communities, and business owners from historically underserved groups, including women, immigrant, BIPOC, veteran, and disability owned enterprises.
- Multilingual team—proficient in English, Spanish, Portuguese, French, and Korean
- In alignment with Maine's Social Equity Program, RCG is committed to providing knowledge, resources, and strategic guidance to help businesses build resilience, enhance operational efficiency, and access new growth opportunities.
- Projects: city of Lynn incubator; Small Business Credit Initiative – State of Washington, Washington State Department of Commerce; City of Revere small business revitalization project
- Subcontractors No

2. Organizational Chart Yes

3. Litigation No litigation

4. Financial Viability, included, looks low-risk

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BIDDER NAME: Roads Consulting Group

DATE: 3/7/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

5. Certificate of Insurance Yes

II. Proposed Services

1. Services to be Provided

- **Overview** RCG will design, implement, and administer Maine's Social Equity Program, ensuring that historically impacted communities receive business development support, technical assistance, outreach, and access to seed funding. Approach will be data-driven, culturally responsive, and results-oriented, aligning with the equity and economic empowerment goals outlined in H.P. 972 - L.D. 1517.

2. Implementation – Work Plan

Accountability & Oversight

- Program Manager will oversee the daily execution of tasks and ensure timely progress.
- Financial Assistance Coordinator will manage funding distribution and compliance.
- Business Development Lead will deliver technical assistance and training.
- Compliance & Policy Specialist will handle legislative reporting and documentation.

RCG's proposed approach ensures that Maine's Social Equity Program is structured, impactful, and sustainable. With our expertise in technical assistance, outreach, and grant administration, we will drive meaningful economic opportunities for impacted communities while ensuring full compliance with state regulations and program goals.

Notes:

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BIDDER NAME: Roads Consulting Group

DATE: March 4, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “RCG brings deep expertise in program management, technical assistance, stakeholder engagement, and grant administration, all of which are critical to ensuring the success of Maine’s Social Equity Program. With extensive experience supporting disadvantaged business enterprises (DBEs), minority-owned businesses, and underrepresented entrepreneurs, RCG understands the barriers that impacted communities face—particularly those affected by historical disparities in the criminal justice system.”
- “Roads Consulting Group, LLC (RCG) is a minority-owned firm dedicated to empowering small businesses through customized technical assistance designed to foster long-term growth and sustainability. Since its founding in 2017, RCG has supported over 2,300 small businesses nationwide with tailored solutions in financial management, marketing strategies, and business development.”
- Boston, MA and Texas offices
- “Our multilingual team—proficient in English, Spanish, Portuguese, French, and Korean—delivers culturally competent and accessible services that meet the unique needs of communities across the United States.”
- 25 professionals with expertise in: Financial Management, Marketing & Branding, Business Development, and Community Outreach. Good.
- Experience with workforce development, business training, administering grant programs, etc., and established relationships with partners like SBDC and minority organizations.
- Previous projects (as listed in cover letter):
“Business of Hard Knocks – City of Lynn, MA: An entrepreneurship training program tailored for formerly incarcerated individuals, equipping them with the tools to establish and sustain small

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

businesses. - Small Business Credit Initiative – State of Washington: A technical assistance program providing capital access and financial literacy support to economically disadvantaged business owners. - Revere Small Business Revitalization Project – City of Revere, MA: Direct technical assistance to 40 minority-owned businesses, enhancing financial management, marketing strategies, and operational resilience.”

- Previous project experience is relevant to the RFP.
- “Our multilingual team—proficient in English, Spanish, Portuguese, French, and Korean—ensures culturally inclusive service delivery, breaking down language barriers and maximizing program accessibility for diverse communities.”
- They describe themselves as having grant administration experience, but the experience described in the three sample projects listed does not include designing or administering grant programs, but other grant-related tasks, such as providing grant readiness workshops and providing businesses with technical assistance, such as helping them apply for grants. But this is different than being involved in the grant design, scoring, and administration process.

2. Subcontractors (if applicable)

- “RCG will not use subcontractors.”

3. Organizational Chart

- Organizational chart is extensive, although it’s not clear who would be working on the project (perhaps that’s addressed in the proposal itself).
- Later in the proposal roles and responsibilities are listed, but not specific personnel:
- Accountability & Oversight • **Program Manager** will oversee the daily execution of tasks and ensure timely progress. • **Financial Assistance Coordinator** will manage funding distribution and compliance. • **Business Development Lead** will deliver technical assistance and training. • **Compliance & Policy Specialist** will handle legislative reporting and documentation.

4. Litigation

**STATE OF MAINE
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RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Roads Consulting Group

DATE: March 4, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- “Roads Consulting Group, LLC confirms that it has not been named in any litigation, past or present, within the last five (5) years. The company has not paid any claimants as part of a settlement or decree during this period.”

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot included:
- Started in 2017; delinquency predictor = low risk
- 2024 Minority-Owned Small Business of the Year (US SBA award)
- NSLBA Business Man of the Year 2023

6. Licensure/Certification

- Not applicable

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Nicely organized and designed proposal.
- “RCG’s methodology incorporates data-driven decision-making, culturally competent program design, and strong stakeholder collaboration to ensure long-term success and measurable outcomes.”
- Scope of Work and Methodology is clearly organized and thoughtful, with both approaches and outcomes.
- “Design a competitive grant application process for distributing the \$150,000 in seed funding. Develop grant guidelines, application forms, and review criteria in compliance with Maine’s competitive procurement policies. Provide one-on-one assistance to applicants to ensure equitable access to funding. Manage grant awards, tracking, and reporting to ensure transparency and accountability.” This is a good list.
- They mention engagement with the Department of Labor, which is really good, as this is mentioned in the statute and in the RFP.

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Roads Consulting Group

DATE: March 4, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

2. Implementation – Work Plan

- Implementation Timeline and Task Assignment – included as a table that follows the flow of the work; it is clear to understand what they intend to do over the course of the contract.
- Overall, a strong proposal with staff with relevant experience and skillsets and previous project experience relevant to the RFP. However, they lack the grant administration experience.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Roads Consulting Group

DATE: March 5, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Roads Consulting Group, LLC (RCG) is a minority-owned firm dedicated to empowering small businesses through customized technical assistance designed to foster long-term growth and sustainability. Since its founding in 2017, RCG has supported over 2,300 small businesses nationwide with tailored solutions in financial management, marketing strategies, and business development.
- “With extensive experience supporting disadvantaged business enterprises (DBEs), minority-owned businesses, and underrepresented entrepreneurs, RCG understands the barriers that impacted communities face—particularly those affected by historical disparities in the criminal justice system”- Good alignment with RFP.
- Boston-based with a team of 25+ experienced in Business \ support/training, Social Equity programs.
- Multi-lingual/culturally competent staff
- Previous projects include the creation of “the Business of Hard Knocks program, an initiative designed to help formerly incarcerated individuals build sustainable businesses. The program included entrepreneurial training, business coaching, access to funding opportunities, and financial literacy workshops. Participants received one-on-one business mentorship and technical support to successfully launch and operate small businesses.” Does related experience include grant administration to effectively create, disburse, and monitor the seed grant portion of the RFP?
- Other project experience includes an out-of-state program.
- Overall, it is impressive organization.

2. Subcontractors (if applicable)

- N/A

3. Organizational Chart

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

- Provided. Dr. Jose Perez, CEO + 21 staff

4. Litigation

- none

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot information provided
- In business since 2017
- Low to moderate risk

6. Licensure/Certification

- Not required for this RFP
- Minority Business Enterprise certification – City of Boston

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- **Project Management & Advisory Committee Coordination** – Planning for “Efficient committee coordination with clear documentation of program development and progress tracking” looks appropriate
- **Program Development & Reach** – “Increased program awareness, high engagement from impacted communities, and direct business support to underrepresented entrepreneurs” based on technical assistance – wide-ranging services and an online portal
- **Grant/Seed Funding Program Administration** – “A fully implemented and accessible grant program, ensuring direct capital infusion to businesses in impacted communities.” - Service looks

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appropriate with helpful one-on-one assistance planned. Will an experienced grant administrator be assigned to this initiative?

- **Stakeholder Consultation & Capacity Building** – “Stronger collaboration across agencies, greater support networks for impacted businesses, and sustainable economic development strategies” – Are there any existing connections to Maine Departments of Education Labor and “local business support organizations”?
- **Legislative Report & Compliance** – “A detailed, well-structured report demonstrating program success, ensuring compliance with Maine’s social equity statute.” – looks fitting

2. Implementation – Work Plan

- Deliverables List provided in table form
- The work plan has 6 phases with swift delivery of assistance and distribution of seed funds
- Each phase of the work plan will have a different responsible party.
-This may be beneficial to specialized roles or may result in communication issues.
- **“Accountability & Oversight**
 - Program Manager will oversee the daily execution of tasks and ensure timely progress.
 - Financial Assistance Coordinator will manage funding distribution and compliance.
 - Business Development Lead will deliver technical assistance and training.
 - Compliance & Policy Specialist will handle legislative reporting and documentation.”

Notes:

“RCG is a minority-owned consulting firm with extensive experience in workforce development, technical assistance, small business support, and economic development initiatives. Over the past seven years, we have successfully assisted over 2,300 small businesses nationwide, focusing on historically marginalized communities, including justice-impacted, BIPOC, immigrant, and women-owned businesses. Our expertise includes grant program administration, business coaching, financial literacy training, and culturally competent outreach strategies.”

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Ryse Local Ventures, LLC

DATE: 3/7/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- RYSE, of Washington, DC, is an economic justice consulting firm focused on accelerating the impact and growth of community-focused initiatives through sustainable capacity and support around impact/performance evaluation, market research, program design, and strategic planning; we also add executive level interim support in the operations and finance functions. CEO is a Bowdoin graduate with economics degree and master's from Cornell.
- Founded in 2019 and incorporated in 2020, RYSE has worked diligently on behalf of small businesses, community-based organizations, public institutions, and the traditionally marginalized communities they serve.
- Projects: Maine CEI (equitable lending and investment strategies for small business owners of color in Maine); Higher Purpose Co. (HPC) Mississippi; Department of Health and Human Services (DHHS) Office of Family Independence in Maine (project focused on evaluating the equitable lending and investment strategies for small business owners of color in Maine.) DHHS entry appeared to be a duplicated text from Project 1 with CEI.

2. Subcontractors

- Several subject matter experts were identified, but it is unclear if they are employees or private consultants.

3. Organizational Chart

- Yes

4. Litigation

- No

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Ryse Local Ventures, LLC

DATE: 3/7/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

5. Financial Viability Yes

6. Certificate of Insurance Yes

II. Proposed Services

1. Services to be Provided

- A very detailed list and description of services to be provided as required. Appear familiar with DECD and OBD's resource summaries and services we provide currently. Grant/seed fund program implementation.

2. Implementation – Work Plan, included

Notes: Have two Maine projects on their list of applicable experience, however it appeared an entry in Project 3 was a copy and paste of Project 1.

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: Ryse Local Ventures LLC

DATE: March 5, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Washington DC firm
- “the bulk of our work has been in evaluation, research, and strategy of programs and projects and RYSE has deep expertise in executing program and project evaluations for clients, as well as conducting participatory research (e.g., surveys, focus groups, 1:1 interviews).”
- “The RYSE Approach integrates data research with lived experiences, ensuring a culturally responsive, historically considerate, and trauma-informed process.”
- Previous experience includes a project for CEI (evaluating the equitable lending and investment strategies for small business owners of color in Maine). and “Efforts were made to ensure inclusive participation, offering flexible interview formats such as in-person, video, or phone options, and providing accommodations for language interpretation and accessibility needs.” This is relevant experience for sure.
- MS project: “The evaluation followed a Community-Based Participatory approach, centering the lived experiences of Black business owners in Mississippi.”
- Third project listed was for: Department of Health and Human Services (DHHS) Office of Family Independence in Maine, but unfortunately the project description for this project was identical to the CEI project, which makes me think this was a typo. It’s unfortunate because it would be interesting (and potentially relevant) to know what they did for DHHS. A typo of this size also points to a lack of attention to deliverable details, which is unfortunate.

2. Subcontractors (if applicable)

- “Of the proposed total cost, an amount not to exceed \$40,000 will be allocated for expenditures related to subcontracting services to

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INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

support program management, policy development, and administrative advisory functions.” Except there’s no policy development in this work.

- Subcontractors:
 - Molly Bashay - Senior Policy Consultant;
 - Dr. Brianna R. Cornelius - Senior Culture & Facilitation Advisor;
 - Jennifer Patel - Project Manager and Staff Support -
 - Jennifer has over 30 years of experience across various roles, including consultancy, executive assistance, business strategy, and brand coordination (good experience).
 - Resumes for these folks are linked, which is a nice touch.

3. Organizational Chart

- For this contract, a powerhouse team of five will lead the effort. This includes two CDFI subject matter experts with deep expertise in the South – one, a former Wall Street banker with proven experience in business and economic development, and the other, a former Biden Administration senior policy advisor with a track record of shaping impactful, national policy.” Not sure why they would highlight deep expertise in the South...? And then “They are joined by a senior culture and facilitation advisor whose lived experience in South Carolina brings invaluable community insight.” Work in other areas of the country is good, but this focus on the South makes me think this language was not revised for this particular proposal.

4. Litigation

- Not applicable

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot submitted with supporting notes to explain risk assessment.

6. Licensure/Certification

- Not applicable

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INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- RYSE will refrain from any direct legislative contact outside of the Commissioner's Office's supervision." That's appreciated.
- Advisory Committee work: "This work will be led by Kayla Baker, Founder and CEO, and supported by Jennifer Patel and one additional support staff person who is yet to be hired."
- Resource Guide: "Main objective: Develop a comprehensive PDF resource guide to support impacted communities in accessing available resources effectively."
- Outreach Strategy: "RYSE will implement a targeted outreach strategy to support business development and success for members of impacted communities. This will include informational sessions, workshops, and webinars to share resources, funding opportunities, and technical assistance tailored to their needs. RYSE will partner with local organizations and business development centers to ensure accessibility, particularly for those facing digital equity challenges." This is a good description.
- "Stakeholder Engagement: Consult with partners (e.g., Small Business Development Centers, Service Corps of Retired Executives) to connect communities with existing resources."
- "RYSE will ensure that the funds are distributed efficiently and equitably, with 5% of the total grant funds (approximately \$7,500) set aside for contingency, as agreed upon by the Commissioner's Office within the Department." This is interesting, not sure what they mean by this. Potential appeals, perhaps?
- "If needed, RYSE will suggest and implement an alternative method for capturing edits and feedback, while adhering to the requirement that Google Docs will not be used for this purpose." This is good attention to the detail of the RFP.

2. Implementation – Work Plan

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

- Implementation/Work Plan is organized in a table with Start and End Dates, Deliverables, Project Lead/Support, Descriptions and Related Tasks
- Some work to be completed by support staff yet to be hired.
- Overall, solid detail and descriptions in the scope of services and implementation sections of the proposal.

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BIDDER NAME: Ryse Local Ventures, LLC

DATE: March 6, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Ryse Local Ventures, led by LLC Kayla Baker / CEO (Bowdoin College graduate) is headquartered in Washington, D.C.
- “RYSE is an economic justice consulting firm focused on accelerating the impact and growth of community-focused initiatives. We add sustainable capacity and support around impact/performance evaluation, market research, program design, and strategic planning; we also add executive level interim support in the operations and finance functions. Our goal is to bring equitable business acumen to the forefront for our clients and the communities that they serve.”
- Framework and process description details a methodical and balanced approach to program design and execution.
- Previous work in Maine with Coastal Enterprises Inc working with business owners of color.

2. Subcontractors (if applicable)

- Molly Bashay - Senior Policy Consultant – through Ryse Local Ventures, LLC
- Dr. Brianna R. Cornelius - Senior Culture & Facilitation Advisor – Evolve Initiative Consulting
- Jennifer Patel - Project Manager and Staff Support – through Ryse Local Ventures, LLC
- Additional Support Staff. At least one additional support staff, with demonstrated analysis and research skills, is in the process of being hired for this contract.

3. Organizational Chart

- “For this contract, a powerhouse team of five will lead the effort. This includes two CDFI subject matter experts with deep expertise in the South – one, a former Wall Street banker with proven experience in business and economic development, and the other,

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

a former Biden Administration senior policy advisor with a track record of shaping impactful, national policy. They are joined by a senior culture and facilitation advisor whose lived experience in South Carolina brings invaluable community insight. Two highly skilled support staff will provide strategic analysis, in-depth research, and seamless project management, ensuring every objective is met with precision and excellence. Kayla Baker - Founder and CEO / Senior Program Lead”

4. Litigation

- None

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot information provided. Bidder notes the inaccuracy of report as follows:
Dear State of Maine Procurement Representative, Financial viability refers to a business's ability to generate sufficient income to meet its financial obligations, sustain operations, and support future growth. It is best assessed through accurate and up-to-date financial records rather than third-party reports that may rely on incomplete data. Per your request, we are submitting the DUNS Business Information Report Snapshot for this proposal. However, we want to note that the information in this report is not accurate, as we have not actively managed our financial reporting with Dun & Bradstreet. We created our first Dun account in late February 2025. As a result, the data does not reflect our actual financial viability. The report includes the following details, though none are representative of our business's true financial position: • Max Credit Recommendation – This figure does not reflect our actual financial capacity, as it is based on incomplete data. • Delinquency Predictor – This score does not account for our actual payment history, as we have not reported financial activity to DUNS. • Financial Stress Score – The rating is based on limited or missing data rather than an accurate assessment of our financial health. • Risk Rating – The overall classification is not a true measure of our

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EVALUATOR DEPARTMENT: Department of Economic & Community Development

risk level, as it is derived from financial records that we have not updated. Additionally, Dun & Bradstreet states that this report is fully disputable, meaning it does not serve as a definitive or verified assessment of our financial viability. Given this, we respectfully request that it have no bearing on the selection or evaluation of contracts. We are happy to provide alternative documentation that more accurately reflects our financial position if needed. Sincerely,
Kayla Baker CEO Ryse Local Ventures LLC

- Overall business risk = Moderate-High
- Business started in 2020.

6. Licensure/Certification

- N/A for this RFP

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Advisory Committee – comprehensive plan provided
- Resource Guide. – to be developed for impacted communities in easy-to-use PDF format = positive
- Outreach Strategy – wide-ranging plan to offer: “This will include informational sessions, workshops, and webinars to share resources, funding opportunities, and technical assistance tailored to their needs. RYSE will partner with local organizations and business development centers to ensure accessibility, particularly for those facing digital equity challenges. Additionally, RYSE will offer personalized support, including guidance on government programs, tax credits, and business networking. This will involve one-on-one consultations and connecting businesses with resources like Small Business Development Centers (SBDCs) and SCORE.”
- Technical Assistance Plan – builds upon outreach plan with “guidance for business start-up, accessing tax credits, and

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navigating regulatory processes" Connection to SCORE and SBDC positive. Particularly positive is the focus on new business owners with business start-up plan.

- Grant/Seed Fund Program - \$ 150k plus \$7,500 contingency plan.
- Draft and Final Report – well-detailed plans
- Meeting Management – looks fitting

2. Implementation – Work Plan

- Deliverables List provided in chart form as "Implementation – Work Plan"
- A balanced work plan is provided with multiple initiatives underway from the outset
- See funding awards completed by August 2025
- Will in-person meetings with stakeholders and awardees be included?

Notes:

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INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: UPLEVEL Management

DATE: 3/7/25

EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- UPLEVEL Management is a mission-driven, woman and minority-owned social impact consulting firm specializing in leadership development, organizational strategy, community engagement, workforce development, and public health initiatives
- Expertise in workforce development, business support services, and grant management. The firm can design and implement programs that enhance economic participation and create sustainable opportunities for historically marginalized populations.
- UPLEVEL has an understanding of the systemic barriers faced by minority-owned businesses and economically disadvantaged communities.
- Holistic Workforce and Business Development Expertise
- Proven Experience in Equity-Driven Grant Management
- Stakeholder-Driven, Collaborative Approach
- Culturally Responsive and Strength-Based Methodology:
- Measurable, Data-Driven Results

- **Projects:** Government Contracting Mentorship Program - Specifically for Minorities; SCORE Summit and Pitch Competition; U54 Multi Center Grant & UI Health COVID Equity Projects; AllianceChicago – PCORI Chapter Virtual Event and Framework Development

2. Subcontractors (if applicable) -No

3. Organizational Chart -Yes

4. Litigation -No

5. Financial Viability -Yes but a section in D&B indicated moderate to high-risk

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EVALUATOR NAME: Ben Sturtevant

EVALUATOR DEPARTMENT: Department of Economic & Community Development

6. Certificate of Insurance -Yes

II. Proposed Services

1. Services to be Provided

- The service provider says the approach ensures that all program services align with the Maine Jobs & Recovery Plan (MJRP), the state's workforce development strategies, and industry labor market demands. The proposed program is structured to complement existing efforts while filling critical gaps that impact underserved and historically excluded communities.

2. Implementation – Work Plan -Yes (lengthy and detailed)

Notes: Uplevel aims to align with existing efforts by DECD and DOL as prescribed in the Maine Jobs and Recovery plan. Uplevel's 4 projects don't indicate business development experience is a strength. Limited geographical or location data in the descriptions to help understand where the projects took place.

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BIDDER NAME: UPLEVEL Management

DATE: March 5, 2025

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- “UPLEVEL Management is a mission-driven, woman and minority-owned social impact consulting firm specializing in leadership development, organizational strategy, community engagement, workforce development, and public health initiatives.”
- “At our core, we design and implement programs that strengthen communities and equip underrepresented entrepreneurs and businesses with the knowledge, capital, and connections necessary to thrive.”
- Experience/Expertise in: Holistic Workforce and Business Development, Equity-Driven Grant Management, Stakeholder-Drive Collaborative Approach, Culturally Responsive and Strength-Based Methodology, and Measurable/Data-Driven Results.
- “The Maine Social Equity Program is an essential initiative under the Maine Jobs & Recovery Plan.” No, this is not a MJRP program, so I am wondering why they are saying this...? Perhaps they’ve bid on previous State of Maine work that was...?
- Previous experience includes public health, educational programming for a government client, educational consulting, leadership for religious organizations, and private sector healthcare. Not a lot of direct business experience.
- Their list of previous projects is mostly healthcare. Great projects, but would like to see more examples of projects involving business development. Vendor work is good, but tangential.
- One previous project was work for SCORE that involved seed funding, where they had to evaluate 100 applications from entrepreneurs. This is good experience. Although there were only three “winners.” So perhaps it was more of a contest than a grant program?

2. Subcontractors (if applicable)

- “No subcontractors will be used for this project.”

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INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Department of Economic & Community Development

3. Organizational Chart

- Org chart reflects six individuals who will work on the project
- Latasha Brooks: Business Development and Grant Program: “Seed funding program design, grant administration, business technical assistance.” Selected relevant experience: “-10+ years of experience in nonprofit management and grants administration walk nonprofits source write and align.” And “-SCORE Central Virginia: write grants to host workshops, teach grant writing workshops.” This is good experience, though overall her business development expertise is not very deep.
- The CEO’s resume is very impressive, though mostly focused on healthcare.

4. Litigation

- “UPLEVEL Management has no current or past litigation cases in the past five years.”

5. Financial Viability

- Founded in 2018
- “UPLEVEL Management has not established a business credit history, which impacts external assessments. However, this does not reflect the organization’s financial stability, revenue, or fiscal management abilities.”
- Maximum credit is \$7,500
- Moderate to high risk.

6. Licensure/Certification

- “UPLEVEL Management does not require specific licensure for the proposed services.”

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

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INDIVIDUAL EVALUATION NOTES**

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- “We recognize that economic mobility and workforce participation require a multi-faceted, holistic approach—one that integrates targeted financial support, technical assistance, workforce training, and policy advocacy.” Okay, but some of these things were not included in the RFP.
- A section of their proposal is called “Maine Jobs & Recovery Plan Alignment.” Not sure why.
- In the Proposed Services and Scope of Work section, they break down the tasks by Methods, Resources, and Expected Outcomes. Specific methods are well thought-out, such as: “Asset-Based Community Development (ABCD): Builds on community strengths rather than deficits” and “Participatory Governance Model: Ensures inclusive decision-making by engaging impacted communities and key stakeholders.”
- For the seed funding grant program, one of their methodologies is: “Participatory Grantmaking Model: Engages impacted communities in funding decisions.” This is an interesting approach, and I would be interested to see more information on how it’s done. Perhaps it’s this (further down the page): “Convene an advisory panel to review applications and ensure equitable distribution of funds.”
- Methodologies for Monthly Progress Meetings: “Kaizen (Continuous Improvement): Uses iterative feedback loops to refine service delivery; and Plan-Do-Check-Act (PDCA) Cycle: Ensures adaptive decision-making and ongoing optimization.” These are strong methods, and specific, which is helpful.
- Nice section on alignment with State of Maine existing plans, but they focus on MJRP, which isn’t exactly right, and they indicate that DECD’s business development programs consist of SBDC and Thrive Maine – which means they didn’t visit OBD’s website at all--- and they also mention Maine DOL; alignment with DOL makes sense and is good to include. I appreciate the attempt to understand, albeit slightly incorrectly, State of Maine specific programs.
- Labor Market Alignment: “Utilization of Real-Time Labor Market Information (LMI): Data from sources such as the Maine Department of Labor, O*NET Online, and the Bureau of Labor Statistics (BLS) will be used to analyze job trends, industry needs,

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and growth sectors.” This is really good, although I’m not sure how much data there is on this.

- “Competency-Based Training Alignment: Programs will align with Maine Apprenticeship Programs, Career and Technical Education (CTE) investments, and the Maine CareerCenters, integrating credentials and industry-recognized training.” Great!
- They mention alignment with 10-year EDS (good) and they suggest collaboration with MTI.
- Overall, a really solid attempt at making their proposal specific to our state and stakeholders.
- They suggest a series of assessments through the project, which I’m not sure there is enough budget for all the level of assessment they are suggesting. Examples include Myers-Briggs, Lean Startup Readiness Assessments, and Competency Gap Analysis. Not sure all this is needed.
- Leveraging Maine’s Existing Small Business and Economic Development Initiatives: By integrating business coaching with resources such as Maine’s Community Development Financial Institutions (CDFIs) and Maine’s technical assistance providers, we ensure entrepreneurs receive capital and operational support beyond the program.” This is good.

2. Implementation – Work Plan

- This work plan details the phased approach to program development and execution.
- Work plan is a table, organized by task, month, etc. followed by detailed list of tasks and methods (the ones they mentioned in the Proposed Services section except specific to the month of the project).
- Overall, an adequate proposal.

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DATE: March 6, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- UPLEVEL Management, led by CEO Zakiya Moton is headquartered in Chicago.
- “a mission-driven, woman and minority-owned social impact consulting firm specializing in leadership development, organizational strategy, community engagement, workforce development, and public health initiatives”
- Previous experience with small business economic development, business funding projects and work with diverse communities.
- Detailed resumes, professional experience, business methodologies, and previous work detailed
- Plans to “work closely with stakeholders to define a shared vision and strategic direction that aligns with local needs, community priorities, and social equity goals”
- Plans to “leverage market research, labor trends, and economic forecasts to identify key opportunities, challenges, and pathways for workforce and business development.” -Will state-level, regional or local data be collected?
- Plans to “engage key stakeholders, including businesses, workforce development organizations, and community-based organizations, to drive alignment, participation, and long-term success.” - Are there pre-existing connections to any of these stakeholders?

2. Subcontractors (if applicable)

- N/A

3. Organizational Chart

- Provided:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

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BIDDER NAME: UPLEVEL Management

DATE: March 6, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

- Zakiya N. Moton, MPH Project Lead/Principal Consultant Project oversight, advisory committee coordination, stakeholder engagement, social equity program design.
- Latasha Brooks Business Development & Grant Program Manager Seed funding program design, grant administration, business technical assistance.
- Torie Sutton, CPA, MBA, CTC Financial/Operations Manager Fiscal management, fund distribution compliance, financial reporting.
- Daphne R. Robinson, JD, MPH Policy & Legal Advisor Policy research, compliance, legislative reporting, advisory committee policy guidance.
- Megan Eiland Training & Development Specialist Business training, technical assistance, outreach plan implementation.
- Jonaee Coffey Administrative & Program Coordinator Meeting facilitation, documentation, stakeholder engagement support.

4. Litigation

- none

5. Financial Viability

- Dun & Bradstreet Business Information Report Snapshot information provided.
- Overall business risk = moderate
- The company is 7 years old
- “UPLEVEL Management has provided its Dun & Bradstreet Business Information Report Snapshot as required. No Business Credit Does Not Reflect Financial Management Capabilities • UPLEVEL Management has not established a business credit history, which impacts external assessments. However, this does not reflect the organization’s financial stability, revenue, or fiscal management abilities. Proven Experience in Managing Multi-Million Dollar Projects • The UPLEVEL team collectively has managed and administered multi-million-dollar budgets in various projects, including grant-funded initiatives, vendor diversity

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

BIDDER NAME: UPLEVEL Management

DATE: March 6, 2025

EVALUATOR NAME: Eric Weidman

EVALUATOR DEPARTMENT: Department of Economic & Community Development

programs, and public health projects. • Key team members, such as Torie Sutton, CPA, MBA, bring extensive financial management expertise, including managing budgets for organizations with annual revenues exceeding \$750 million. • The team has successfully overseen grant distributions, vendor contracts, and financial reporting for large-scale initiatives, such as: ○ BlueCross BlueShield of Illinois Medicaid Vendor Reinvestment Program – Managed \$1.3 million in vendor reinvestment funds, ensuring proper disbursement and tracking. ○ University of Illinois Cancer Center COVID-19 Response – Engaged over 1,000 multi-sector partners, ensuring efficient resource allocation. ○ Multiple grant-funded initiatives – Managed fiscal oversight, compliance, and reporting. Operational and Compliance Strength • While the business credit profile may not be robust due to the nature of operations and payment structures, UPLEVEL has never had any financial penalties, unpaid obligations, or negative financial history. • The company is fully compliant with all financial reporting and contractual obligations. Ability to Deliver on Large-Scale Contracts • Despite the external credit limitations, UPLEVEL Management’s track record speaks to its capability to handle government and grant-funded projects. • The firm’s budgeting, financial tracking, and compliance mechanisms ensure that projects are executed efficiently and funds are managed responsibly”

6. Licensure/Certification

- N/A for this RFP
- IL W/MBE Certification

7. Certificate of Insurance

- Included, as required

II. Proposed Services

1. Services to be Provided

- Advisory Committee Coordination – balanced approach

**STATE OF MAINE
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- Program Development- Wide-ranging supports including “tax credits, financial management, compliance, mentorships, training, and hands-on coaching”.
 - a. “Design outreach initiatives tailored to cultural and linguistic preferences” - Are there multi-lingual team members or a plan for electronic/print resources in multiple languages?
 - b. “Enhanced financial literacy” is an expected outcome – How will this be measured?
- Technical Assistance
 - a. Business toolkits and peer-mentoring -great ideas
 - b. Will one-on-one coaching be virtual and/or in-person?
- Seed Funds -What is the expectation of the number and size of awards?
- Stakeholder Consultation -data-driven with effective feedback in the process
- Legislative Reporting – required reporting plans documented.
- Progress Meetings – will use Kaizen and PDCA Cycle processes

2. Implementation – Work Plan

- Deliverables List provided
- The project is broken down into four phases (Initiation, Development, Implementation, Reporting & Sustainability Planning)

Notes:

Considerable thought and planning have gone into connecting with existing state organizations and agencies in creating effective programming.

Ex. “UPLEVEL Management will coordinate with DECD’s business support programs, such as the Maine Small Business Development Centers, and financing initiatives like Thrive Maine”. “The initiative will align with the Maine Department of Labor’s workforce development programs, including apprenticeship and sector-based training efforts”.



STATE OF MAINE
DEPARTMENT OF ECONOMIC &
COMMUNITY DEVELOPMENT

Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

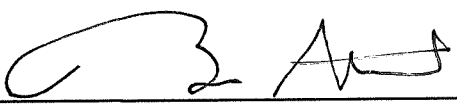
I, Ben Sturtevant, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Economic & Community Development. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection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

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

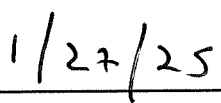
I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

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

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



Signature



Date



STATE OF MAINE
DEPARTMENT OF ECONOMIC &
COMMUNITY DEVELOPMENT

Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

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

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

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Charlotte R. Mace

Signature

11/4/24

Date



STATE OF MAINE
DEPARTMENT OF Economic &
Community Development

Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202411196

RFP TITLE: Economic Development Social Equity Program Establishment and Administration

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

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

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

Eric Weidman

3/4/2024

Signature

Date