

State of Maine
Master Score Sheet

RFP# 202405101					
Blue Economy Task Force and Subject Matter Expert					
Bidder Name:		Acadia Capital Management L3C	Camoin Associates	Fourth Economy	HR&A Advisors
Proposed Cost:		\$98,900	\$100,000	\$99,915	\$91,000
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	40	20	35	35	34
Section III: Proposed Services	35	25	33	25	33
Section IV: Cost Proposal	25	22.1	21.9	21.9	24
TOTAL	<u>100</u>	<u>67.1</u>	<u>89.9</u>	<u>81.9</u>	<u>91</u>
Bidder Name:		Maine Development Foundation	Michael Conathan	MustardSeed PMO	Steamboat Road Consulting
Proposed Cost:		\$100,000	\$98,496	\$93,040	\$87,500
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	40	35	39	20	35
Section III: Proposed Services	35	28	34	22	30
Section IV: Cost Proposal	25	21.9	22.2	23.5	25
TOTAL	<u>100</u>	<u>84.9</u>	<u>95.2</u>	<u>65.5</u>	<u>90</u>

Award Justification Statement
RFP# 202405101 Blue Economy Task Force Project Management
and Subject Matter Expertise

I. Summary

The State of Maine sought proposals for a qualified professional firm to assist with staffing of the State of Maine's Blue Economy Task Force, per S.P. 523 – LD 1286, *Resolve, to Establish the Blue Economy Task Force to Support Maine's Emergence as a Center for Blue Economy Innovation and Opportunity in the 21st Century*. With oversight and strategic direction provided by the Department of Economic & Community Development's Office of Business Development, the staffing will include project management, subject matter expertise in blue economies across the globe, adherence to the statute, and preparation of a report to the 132nd Legislature in 2025.

II. Evaluation Process

The Office of Business Development's Director comprised a team of three individuals to review proposals. The evaluators included a business development manager specializing in small businesses and innovation, a marketing, communications, and legislative specialist, and a market attraction leader with previous substantial experience in public procurement within the State of Maine. The evaluators applied the consensus method in scoring the Bidders Qualifications and Experience and Proposed Services. Scores for the cost proposal were assigned using a mathematical formula.

III. Qualifications & Experience

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

- Strength of organization and previous experience, particularly with blue economy
- Strength of team, including data, blue economy expertise, project management, and innovation
- Scope of services, thoughtfully described and in alignment with the RFP
- Thorough work-plan and timeline in alignment with the RFP and statutory requirements.

IV. Proposed Services

The bidder's experience and qualifications in blue economy, project management, and economic baseline work, as well as their thoughtful and well-constructed approach and work plan yielded high scores for their proposed services and scope of work.

V. Cost Proposal

Respondent		Cost of Lowest Cost Proposal	/	Cost Proposal Being Scored	X	Score Weight	=	Score
Acadia Capital Management L3C		\$87,500	/	\$117,435	X	25 points	=	22.1
Camoin Associates		\$87,500	/	\$100,000	X	25 points	=	21.9
Fourth Economy		\$87,500	/	\$99,915	X	25 points	=	21.9
HR&A Advisors		\$87,500	/	\$91,000	X	25 points	=	24
Maine Development Foundation		\$87,500	/	\$100,000	X	25 points	=	21.9
Michael Conathan Consulting LLC		\$87,500	/	\$98,496	X	25 points	=	22.2
MustardSeed PMO		\$87,500	/	\$93,040	X	25 points	=	23.5
Steamboat Road Consulting		\$87,500	/	\$87,500	X	25 points	=	25

VI. Conclusion

Out of 100 points, Michael Conathan Consulting LLC scored the highest, with 95.2 points awarded by the evaluation team. The strengths of Michael Conathan Consulting LLC's proposal include a strong, well-experienced organization with previous experience directly relevant to the services needed. Michael Conathan Consulting's thoughtful and detailed scope of services and work plan, along with their competitive cost proposal, resulted in a determination by the evaluation team that Michael Conathan Consulting's represents the best value to the State of Maine.



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

**Janet T. Mills
Governor**

**Heather Johnson
Commissioner**

July 26, 2024

Dr. Brien C. Walton, CEO
Acadia Capital Management L3C
499 Broadway STE 118
Bangor, ME 04401

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Dr. Walton:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic and Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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:

- Michael Conathan Consulting, LLC

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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,

A handwritten signature in black ink, reading "Charlotte R. Mace". The signature is written in a cursive style with a large initial "C" and a stylized "M".

Charlotte R. Mace, Director
Office of Business Development

STATEMENT OF APPEAL RIGHTS

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



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July 26, 2024

Rob Camoin
Camoin Associates
PO Box 3547
Saratoga Springs, NY 12866

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Mr. Camoin:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic and Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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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Office of Business Development

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July 26, 2024

Sally Guzik, Vice President
Fourth Economy Consulting, Inc.
PO Box 81620
Pittsburgh, PA 15217

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Ms. Guzik:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic & Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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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Sincerely,

A handwritten signature in black ink, appearing to read "Charlotte R. Mace". The signature is fluid and cursive, with the first name "Charlotte" written in a larger, more prominent script than the last name "Mace".

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

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July 26, 2024

Cary Hirschstein
HR&A Advisors
99 Hudson Street
New York, NY 10013

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Cary:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic & Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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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Charlotte Mace
Director, Office of Business Development
Department of Economic & Community Development

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**Heather Johnson
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July 26, 2024

Anne Schlitt
Maine Development Foundation
2 Beech Street, Suite 203
Hallowell, ME 04347

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Ms. Schlitt:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic & Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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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Charlotte Mace
Director, Office of Business Development
Department of Economic & Community Development

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**Heather Johnson
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July 26, 2024

Michael Conathan
Michael Conathan Consulting, LLC
164 Fort Road
South Portland, ME 04106

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Mr. Conathan:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic & Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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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Charlotte Mace
Director, Office of Business Development
Department of Economic & Community Development

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**STATE OF MAINE
DEPARTMENT OF ECONOMIC AND
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**Heather Johnson
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July 26, 2024

Cameron Robinson, Head of Commercial
MustardSeed PMO
819 Roslyn Avenue
West Chester, PA 19382

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Mr. Robinson:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic & Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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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Charlotte Mace
Director, Office of Business Development
Department of Economic & Community Development

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**STATE OF MAINE
DEPARTMENT OF ECONOMIC AND
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**Janet T. Mills
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**Heather Johnson
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July 26, 2024

Jason Mitchell, Principal
Consultant and Founder
Steamboat Road Consulting, LLC
245 Commercial Street, STE 118
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award under RFP # 202405101, Blue Economy Task Force Project Management and Subject Matter Expertise

Dear Mr. Mitchell:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Economic & Community Development for Blue Economy Task Force Project Management and Subject Matter Expertise. 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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Charlotte Mace
Director, Office of Business Development
Department of Economic & Community Development

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Acadia Capital Management L3C

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• N/A	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	20
Section III. Proposed Services	35	25
Section IV. Cost Proposal	25	22.1
<u>Total Points</u>	<u>100</u>	<u>67.1</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Acadia Capital Management L3C

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Acadia Capital Management L3C

DATE: July 9, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	20

Evaluation Team Comments:

I. Organization Qualifications and Experience

A. Overview of Organization

Global blue economy expertise is limited; they explain it in terms of case studies, not projects they have worked on themselves. “Our global perspective on the blue economy is informed by detailed case studies from various countries. For example, Norway’s approach...”

Solid experience but they admit they’re not experts. And we’ve specifically asked for experts.

Dr. Walton does have international blue economy experience, but it is mostly policy-related, specific to international policies and agreements.

Previous project experience: “A notable example is my involvement in a project that used satellite data to monitor and manage marine protected areas effectively.”

Investments made by MVF aren’t direct experience in developing blue economy strategy.

Projects listed aren’t directly related to the scope of work described in the RFP.

B. Subcontractors

None

C. Organizational Chart

- Included, but the expertise for the individuals shown, and descriptions of prior projects, is not addressed sufficiently in the proposal.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Acadia Capital Management L3C

DATE: July 9, 2024

D. Litigation

- None

E. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Acadia Capital Management L3C

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments:

II. Proposed Services

A. Services to be Provided

Detailed work plan broken down into tasks, but no specific example of the entities to be consulted; work plan isn't presented in a way that shows the consultant knows the industry or players well.

This is not as important as following the procedure outlined in the statute, although good project management methods are important.

Overall, these details are quality over quantity.

B. Implementation – Work Plan

- Clearly define what success looks like for each task and deliverable, including specific, measurable, achievable, relevant, and time-bound (SMART) criteria. This is a good tactic.
- Establish benchmarks and key performance indicators (KPIs) to track progress against these criteria. The requirements of the statute are more important than other defined KPIs by the consultant, however.
- Timeline doesn't match up with the RFP or statute.
- Bar graph isn't a good format for showing this
- Not a strong proposal – i.e., does not address the RFP sufficiently.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Acadia Capital Management L3C

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	,	\$98,900	x	25 points	=	22.1

Evaluation Team Comments:

- None
- Cost is straightforward, described in statute.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Camoin Associates

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
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<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
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<u>Total Points</u>	<u>100</u>	<u>89.9</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Camoin Associates

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Camoin Associates

DATE: July 9, 2024

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

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

Evaluation Team Comments:

1. Overview of the Organization

- Right away they are identifying their SME, which is good, Charlie Colgan (Center for Blue Economy)
- Visually compelling proposal, well organized, easy to understand, clear
- Projects are mostly relevant
- Previous experience with similar projects
- Would like to see a bit more global experience or experience in other states
- Good familiarity with Maine

2. Subcontractors

- Charlie Colgan, the Director of Research for the Center for the Blue Economy

3. Organizational Chart

- Project at the top rather than the CEO, which is good
- Tori McNiff, Project Manager; Jim and Alex, senior advisors
- Industry Expertise: Charlie Colgan
- And two researchers

4. Litigation

- Camoin Associates has not been involved in any litigation over the last five years.

5. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Camoin Associates

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	33

Evaluation Team Comments:

1. Services to be Provided

- Minimal description of Consultation – they could have at least regurgitated the list from the statute and added their own thoughts/ideas to that, even on a basic level.
- The statute is clear that the Task Force will conduct the consultations. Thinking outside the box is great, but Camoin should have described in their proposal their idea for this work-around, that still satisfies the statute.
- Perhaps a bit too much focus on data evaluation; statute is light on that
- Legislative Letter – they’ve offered to present to the committee. Good.

2. Implementation – Work Plan

- Light on details on the timeline
- Otherwise, good details here.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Camoin Associates

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	,	\$100,000	x	25 points	=	21.9

Evaluation Team Comments:

- None
- Costs are clearly defined in statute.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Fourth Economy Consulting, Inc.

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic and Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35
Section III. Proposed Services	35	25
Section IV. Cost Proposal	25	21.9
<u>Total Points</u>	<u>100</u>	<u>81.9</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Fourth Economy Consulting, Inc.

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Fourth Economy Consulting, Inc.

DATE: July 9, 2024

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

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

Evaluation Team Comments:

1. Overview of the Organization

- Overview easy to understand
- Specific state-level blue economy work in RI (very in-depth)
- The RI and the Southeast New England Ocean Tech Hub Phase 1 application is experience relevant to this scope of work.

2. Subcontractors

- None

3. Organizational Chart

- Rich Overmoyer, Sally Guzik, and others; experience and resumes are strong overall

4. Litigation

- There has been no litigation in the last 5 years

5. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Fourth Economy Consulting, Inc.

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments:

1. Services to be Provided

- They've called out the challenges of the project, which is good.
- They've shown they understand how different RI is from Maine
- Some familiarity with Maine, outdoor rec work
- Substantial work proposed on economic imbalances although this was not a requirement of the RFP or statute; too much focus on this in their description of services
- Not sure the public-private partnership recommendation is particularly relevant here; the recommendation has a lot of value for sure, but the BETF itself is a public-private partnership already
- "Addressing economic disparities and ensuring that marginalized communities benefit from blue economy initiatives is crucial." It is but the legislature did not ask for this.

2. Implementation – Work Plan

- Timeline was fine, sufficient

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Fourth Economy Consulting, Inc.

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	,	\$99,915	x	25 points	=	21.9

Evaluation Team Comments:

- None
- Costs are clearly defined in statute.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: HR&A Advisors

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	34
Section III. Proposed Services	35	33
Section IV. Cost Proposal	25	24
<u>Total Points</u>	<u>100</u>	<u>91</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: HR&A Advisors

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: HR&A Advisors

DATE: July 9, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	34

Evaluation Team Comments:

1. Overview of the Organization

- Experience in RI, and state planning efforts in Maine, which is good experience and relevant to Maine
- RI Phase 2 Build Back Better grant application experience
- They've done projects for the State of Maine as well, housing, energy
- They led the effort to secure \$70M in appropriations from the State of RI for blue economy development.

2. Subcontractors

- Subcontractors will not be used as part of HR&A Advisors, Inc's proposal.

3. Organizational Chart

- Team has substantial experience specific to Long Island, Rhode Island, and Maine
- The partner in charge has most experience with urban planning and less expertise on blue economy; another team member is an economist which is good; another team member is civil engineer; their projects are good, but not seeing the deep marine expertise
- The proposal doesn't include anyone who is a data expert, which is important for the baseline economic analysis.

4. Litigation

- HR&A Advisors, Inc does not have any current litigation in which HR&A Advisors, Inc is named or any closed cases that have closed within the past five (5) years.

5. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: HR&A Advisors

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	33

Evaluation Team Comments:

1. Services to be Provided

- Outside the task force, communication is primarily email; which may not be the most efficient way to communicate
- Good description of how to strategize with BETF, but perhaps overly simplified
- “We will work with the OBD to ensure that the OBD’s and the BETF’s priorities are incorporated and presented effectively, and to the extent possible, ensure that the legislative letter helps make the case for the OBD to request additional state funding for the implementation of the recommendations described in the BETF report.” Not sure we agree with this. It’s what the BETF decides, rather than what OBD is seeking. This is an important distinction.
- “We will strategize with the BETF on how to position and differentiate Maine’s definition in the U.S. and globally. For example, as the world moves away from the traditional definitions of blue economy, which included fossil fuels, Maine may have expanded opportunity in highlighting its potential to use ocean resources for clean energy generation (e.g., using Maine’s leading position on floating offshore wind) and blue carbon sequestration (e.g., using Maine’s vast habitat of marshes, eelgrass beds and seaweeds).” This is also a very strong section, pleased they’ve thought about this for Maine.
- They cite the correct reports for Maine, which shows they’ve done their homework.

2. Implementation – Work Plan

- Good content for the website/social media
- Thoughtful that monthly progress meetings would be staggered for ease of Maine

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: HR&A Advisors

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	,	\$91,000	x	25 points	=	24

Evaluation Team Comments:

- None
- Costs are clearly defined in statute.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Maine Development Foundation

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic and Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35
Section III. Proposed Services	35	28
Section IV. Cost Proposal	25	21.9
<u>Total Points</u>	<u>100</u>	<u>84.9</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Maine Development Foundation

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Maine Development Foundation

DATE: July 9, 2024

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

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

Evaluation Team Comments:

1. Overview of the Organization

- A lot about MDF's history but not enough discussion of previous blue economy experience.
- Overall, the proposal was not at the level of quality required to respond fully and effectively to the RFP

2. Subcontractors

- "On this project, MDF will partner with Homarus Strategies as the content lead and Catherine DeLutio of Maine Applied Research for a peer data review of the economic baseline work."
- Proposal describes what Homarus will do in sufficient detail, but not what Catherine DeLutio would do in great enough detail to be understood; this was an omission perhaps
- The MDF experience is good, Homarus' is average quality, Catherine's is not described well enough to determine.

3. Organizational Chart

- Really hard to read
- It would have been good to see an org chart for the project within the work plan.

4. Litigation

- I think they indicated in the submission email that they have no litigation. The preference is to have this information included in the proposal

5. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Maine Development Foundation

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments:

1. Services to be Provided

- Proposal went beyond the RFP but goes beyond the scope of the RFP and statute, which was a bit odd
- Inappropriate to suggest Blaze and branding work; outside of the scope
- Higher-level descriptions, could have included more details on proposed methods and strategies
- While MDF has extensive knowledge of State agencies, there should have been more detail specific to the RFP
- Regular updates to DECD, good
- Additional focus on work not asked for in the RFP
- “Our process will rely on activating the wisdom and experience of the BETF members and other individuals and entities involved in the blue economy.” Yes. Listening to BETF is critical here.

2. Implementation – Work Plan

- Timeline was good and in line with the RFP; could have been more detailed, color-coding was confusing at times
- One reviewer did like the workplan and color coding
- “Phase 4 of the project includes extra tasks not included in the RFP:
- Phase 4 - Next steps & delivering the message
 - Blue Economy branding workshop
 - BETF 2025/26 focal area planning
 - BETF road show planning
 - BETF road show implementation”
- Our preference is that vendors stick to the tasks described in the RFP. We did not ask for a road show.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Maine Development Foundation

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	,	\$100,000	x	25 points	=	21.9

Evaluation Team Comments:

- None
- Costs are clearly defined in statute

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Michael Conathan Consulting, LLC

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic and Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	39
Section III. Proposed Services	35	34
Section IV. Cost Proposal	25	22.2
<u>Total Points</u>	<u>100</u>	<u>95.2</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Michael Conathan Consulting, LLC

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Michael Conathan Consulting, LLC

DATE: July 9, 2024

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

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

Evaluation Team Comments:

1. Overview of the Organization

- National experience is impressive and relevant
- Deep experience
- A lot of diverse clients
- Substantial previous blue economy work
- There was a project with Builds Initiative for blue economy cluster development.

2. Subcontractors

- SAMBAS Consulting, LLC (Cumberland Foreside) – Laura Singer (will serve as facilitator) – off-shore wind, Maine Climate Council
- BioHarbor Strategies LLC (Ogunquit) – Dana O'Brien ("Dana will apply his unique policy, political, and communications acumen broadly across the project to ensure the BETF report is compelling, and its recommendations are pragmatic and achievable.")
- Center for the Blue Economy, Middlebury Institute of International Studies at Monterey (CA) – Charles Cogan ("He and his Research Associate Tony Castelletto will serve as subject matter experts for the Task Force, supporting and participating in research, consultations and discussions. They will provide critical background information and data to support the Task Force's recommendations and contribute significantly to development of the BETF Report.")
- Strong team with deep, relevant experience;

3. Organizational Chart

- Described fully with detailed breakdown of who will do which task.

4. Litigation

- Michael Conathan Consulting LLC is not named in any current litigation and does not have cases closed within the past five (5) years in which Michael Conathan Consulting LLC paid the claimant either as part of a settlement or by decree.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Michael Conathan Consulting, LLC

DATE: July 9, 2024

5. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Michael Conathan Consulting, LLC

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	34

Evaluation Team Comments:

1. Services to be Provided

- Quality description, and thorough, which shows the depth of their team.
- Meeting formats are inconsistent throughout the proposal, this will need to be adjusted.
- Timeframe may need to be adjusted
- They suggest a half-day kick-off meeting and another in-person meeting for the BETF – this may be too much
- Narrative rambles a bit at times but the content is very solid.
- They've also suggested meeting reports, which aren't needed.
- Overall approach seems sufficient

2. Implementation – Work Plan

- Timeline made sense but meetings suggested may be long
- Strong approach suggested for the consultations
- They've suggested an implementation roadmap, which is not a deliverable we asked for.
- Overall, the work plan is strong and addresses the requirements of the RFP.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Michael Conathan Consulting, LLC

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	,	\$98,496	x	25 points	=	22.2

Evaluation Team Comments:

- None
- Costs clearly defined in statute.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: MustardSeed PMO

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic & Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	20
Section III. Proposed Services	35	22
Section IV. Cost Proposal	25	23.5
<u>Total Points</u>	<u>100</u>	<u>65.5</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: MustardSeed PMO

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: MustardSeed PMO

DATE: July 9, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	20

Evaluation Team Comments:

1. Overview of the Organization

- They've tried to connect life sciences to blue economy, and this doesn't really work
- Their experience isn't the type of experience we are hoping for
- Strong in project management experience, but not blue economy expertise
- Proposal felt very cookie-cutter, not tailored to the State of Maine
- Overall, their previous experience in blue economy is insufficient for this work

2. Subcontractors

- MustardSeed will not be working with any subcontractors for this project.

3. Organizational Chart

- The lead SME: "Our strength lies in our staff, and our lead subject matter expert (SME), **Ms. Kylie Cannon (PMP, MPA)**, brings a wealth of economic development knowledge to this project. Ms. Cannon has deep experience in both project management and economic development practices in the public sector. Her graduate studies and past work include research on industry clusters and training in economic development finance from the National Development Council (now Grow America). As a Community Planner with the U.S. Department of Transportation's Build America Bureau, Ms. Cannon spoke as a panelist about public-private partnerships and government financing opportunities at national conferences of state and local government audiences."
- No blue economy experience here. The RFP was clear that this was needed.

4. Litigation

- MustardSeed is not named in any current or past litigation.

5. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: MustardSeed PMO

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	35	22

Evaluation Team Comments:

1. Services to be Provided

- The communications aspect of the proposal was too brief; there will be a lot of folks to corral here, so their description was lacking
- Very high-level and insufficient with details to help us figure out how they would comply with the RFP/statute
- It's their opinion that it's a life sciences project and we need a roadmap; we did not ask for a roadmap, nor is this strictly a life sciences project
- They would review public records to ensure that the legislative letter is consistent with others in Maine – good.
- “We will conduct a thorough review of existing literature on: (1) the blue economy landscape, both nationally and internationally;” It is hoped that the consultant hired to do this work is already a subject matter expertise on national and international blue economy topics and will not require project time to come up to speed on these topics.

2. Implementation – Work Plan

- Very detailed yet included a blue economy roadmap, which is unnecessary
- Draft and final reports in November and December, and this feels too ambitious
- There wasn't a clear timeline and workplan enough to prove that such an ambitious timeline is possible
- Two-hour meetings, which feels long
- The BETF meetings should be devoted to the Consultations described in the statute, not collaborate work meetings to help the consultant revise and finalize deliverables.
- Deliverable is Blue Economy Roadmap. No. The deliverable is titled according to statute and is not a roadmap.
- Overall, the review team had a lot of issues with the proposed approach, strategy, deliverables, and work plan.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: MustardSeed PMO

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	÷	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	÷	\$93,040	x	25 points	=	23.5

Evaluation Team Comments:

- None
- Costs are clearly listed in statute

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Steamboat Road Consulting, LLC

DATE: July 9, 2024

SUMMARY PAGE

Department Name: Department of Economic and Community Development

Name of RFP Coordinator: Charlotte Mace, Director, Office of Business Development

Names of Evaluators: Charlotte Mace, Victoria Foley, Jake Daniele

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

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Steamboat Road Consulting, LLC

DATE: July 9, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Steamboat Road Consulting, LLC

DATE: July 9, 2024

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

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

Evaluation Team Comments:

1. Overview of the Organization

- Venture arm
- They noted and seemed to be working to highlight their strong relationships with Maine's top blue economy stakeholders
- They work with MCE
- Assertive proposal, citing the LD number
- Previous experience is mostly focused on the seafood sector
- Would like to see more global blue economy experience, more than just Maine seafood.

2. Subcontractors

- Steamboat Road Consulting does not plan to use any subcontractors for this scope of work.

3. Organizational Chart

- Well-organized
- Who will do the data crunching of the economic baseline?

4. Litigation

- "Steamboat Road Consulting (SBRC) is not currently named in any litigation. SBRC has not paid the claimant of any closed cases within the past five (5) years, either as part of a settlement or by decree."

5. Certificate of Insurance

- Included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

BIDDER: Steamboat Road Consulting, LLC

DATE: July 9, 2024

**EVALUATION OF SECTION III
Proposed Services**

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

Evaluation Team Comments:

1. Services to be Provided

- They understand the Maine resources for information and how they could leverage that
- They called out specific tools they would use – like SWOT, which is helpful
- They describe that they will develop report outline and come up with KPIs, but this is mostly already defined in the statute, so they should have referenced that.

2. Implementation – Work Plan

- The proposal demonstrated clear understanding of the timeline
- They do a good job of pointing out that the timeline is very short
- But they unrealistically claim to finish most of the tasks in the first month
- Their work plan was really strong, pursuant to the statute and included notations of team members who would be involved
- Realistic, clear and easy to understand
- Solid task descriptions
- Communications plan was clearly identified
- 33 tasks in the work plan
- They reference identifying climate risks – this work is already being done very well by the State of Maine and GMRI, it's also not in the RFP or statute; same thing with the workforce development work, which was not asked for.

**STATE OF MAINE
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BIDDER: Steamboat Road Consulting, LLC

DATE: July 9, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$87,500	,	\$87,500	x	25 points	=	25

Evaluation Team Comments:

- None
- Costs are clearly defined in statute
- Not sure why they undercut. We will be left with a substantial amount of funds that were appropriated for the work yet will not be spent (\$12,500) – this seems unnecessary. That’s over 12% of the budget.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Acadia Capital Management L3C

DATE: 6/26/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

“Acadia Capital Management L3C (ACM) is a nonprofit, U.S. Treasury-certified community development entity (CDE) based in Bangor – the only minority-controlled CDE in Maine.”

“Acadia Capital Management’s extensive experience in economic development, sustainable practices, and innovative solutions, coupled with our proven leadership and commitment to community engagement, makes us exceptionally qualified to manage the blue economy task force.”

Global blue economy expertise is limited; they explain it in terms of case studies, not projects they have worked on themselves. “Our global perspective on the blue economy is informed by detailed case studies from various countries. For example, Norway’s approach...”

Dr. Walton does have international blue economy experience, but it is mostly policy-related, specific to international policies and agreements.

Previous project experience: “A notable example is my involvement in a project that used satellite data to monitor and manage marine protected areas effectively.”

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

“ACM worked with Whole Oceans LLC (aquaculture) in locating and financing their plant in Bucksport, worked with the Passamaquoddy Tribe on their lobster boat fishing fleet financing, and through the Maine Venture Fund, the CEO has worked with several blue economy companies, such as *American Unagi LLC*, *Katahdin Salmon, Inc.*, *Atlantic Sea Farms*, *Blue Trace*, and other companies focused on sustainable aquaculture, marine robotics, and ocean data analytics, all of which are critical components of the blue economy.”

Investments made by MVF isn't direct experience in developing blue economy strategy.

Projects listed aren't directly related to the scope of work described in the RFP.

2. Subcontractors

None

3. Organizational Chart

- Included but the expertise for the individuals shown, and descriptions of prior projects, is not discussed in the proposal.

4. Litigation

- None

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

Detailed work plan broken down into tasks, but no specific example of the entities to be consulted; work plan isn't presented in a way that shows the consultant knows the industry or players well.

Generic project management tactics listed, including:

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Project management software (e.g., Trello, Asana, or MS Project) to organize tasks and track progress.

Gantt charts or similar tools to visualize the project timeline and ensure all activities are on track.

Risk management templates.

This is not as important as following the procedure outlined in the statute, although good project management methods are important.

Overall, these details are quality over quantity, unfortunately.

2. Implementation – Work Plan

Clearly define what success looks like for each task and deliverable, including specific, measurable, achievable, relevant, and time-bound (SMART) criteria.

(2)

Establish benchmarks and key performance indicators (KPIs) to track progress against these criteria.

Okay, but I'm not sure this is relevant. What's more important are the statutory requirements. Instead of SMART and KPI, let's ensure adherence to the statute...

Detailed work plan although there is no mention of roles and responsibilities so presumably Brien Walton would do all tasks...?

"Allocate resources efficiently to ensure all tasks are adequately staffed and supported." Who would staff?

"Provide training sessions for team members on project management tools, communication protocols, and quality assurance processes.

"Ensure all team members are equipped with the skills and knowledge needed to execute their tasks effectively." What team?

These are solid methods, but they're not clearly connected to specific staff in the proposal.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Acadia Capital Management L3C

DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

L3C led by Dr Brien Walton – Corp lawyer, professor, chair of Maine Venture Fund.

They state - “our CEO served as an environmental attorney for a publicly traded environmental remediation firm under contract with the U.S. Navy and is familiar with international policies and agreements that impact the blue economy, such as the United Nations Sustainable Development Goals (SDGs), specifically SDG 14 (Life Below Water), and the United Nations Convention on the Law of the Sea (UNCLOS). Regionally, he has studied the European Union’s Integrated Maritime Policy and the African Union’s Blue Economy Strategy, understanding their implications for sustainable development and international cooperation.”

Slightly concerning - “Although we are not experts in all aspects of the blue economy, we are aware of what we do not know and can get up to speed on any topic very quickly, as evidenced by our work contracting with FAME and DECD on evaluating companies in niche industries or with unique, one-off projects. Dr. Walton has dedicated his career to advancing sustainable and innovative solutions within the blue economy. His expertise spans multiple facets of the blue economy, including fisheries management, marine biotechnology, and ocean energy development.”

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

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DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Sustainability – business incubator based in Maine that won US Department of Energy Award. This is neat but not necessarily Blue Economy experience.

Example projects – both are related to ARPA funding and are grant review based. Different than this RFP.

2. Subcontractors
None

3. Organizational Chart
5 boxes shown including Dr Walton with a Governing Board of three (including Dr Walton).

Others are Admin assistant, a Director of Community Engagement, and Director of Business Process Management.

Very basic and not visually appealing. Unclear which person on team would be doing which tasks.

Who is the support team? Others in the org are not discussed which does not provide details for review.

4. Litigation
None

5. Certificate of Insurance
• Included

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Seemed to have generic management plan. No specifics to the BETF. Outline having monthly meetings, engaging with BETF members and Stakeholders but one of the items is to identify stakeholders. Do they not already know some stakeholders? Would have preferred to hear – confirm stakeholders.

“Stakeholder Engagement:

(1) Identify and prioritize key stakeholders to consult based on the statute requirements”

“Resources: i. Human Resources: (1) Policy analysts and legal advisors for drafting and reviewing the legislative letter. ii. Technological Resources: (1) Microsoft Word or other word processing tools for drafting the letter. (2) Review and approval of workflows. (3) Communication templates for legislative documents.”

Seems somewhat generic.

2. Implementation – Work Plan

Included though seems a little relaxed. Not making the list of stakeholders until Month 2? Seems good to start drafting report in month 4-5. Timeline graph was a nice touch though I don’t think a bar graph is a good representation.

Questions – who is doing all of this work?

Are all deliverables addressed from RFP?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Acadia Capital Management L3C

DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Experience in several sectors that overlap with/are connected to the blue economy.

“Acadia Capital Management L3C (ACM) is a nonprofit, U.S. Treasury-certified community development entity (CDE) based in Bangor – the only minority-controlled CDE in Maine. Since its inception, ACM has been dedicated to fostering economic growth, innovation, and sustainable development within local communities. Our focus spans various sectors, including technology, renewable energy, and marine resources, positioning us uniquely to support the blue economy.”

Solid overview, meeting requirements of the RFP. However, this group appears to have limited experience specific to the blue economy.

2. Subcontractors

None.

3. Organizational Chart

Provided.

4. Litigation

None.

5. Certificate of Insurance

Provided.

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DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

II. Proposed Services

1. Services to be Provided

Clear and extensive outline of methods, resources, and processes provided. Timeline does not match RFP requirements (see Implementation notes, below).

Strategies for ongoing communication and feedback loops appear to be comprehensive.

“2. Robust Communication and Coordination a. Methods:

i. Schedule monthly remote meetings using Zoom or Microsoft Teams.

ii. Create and distribute meeting agendas, calendar invites, and meeting links in advance.

iii. Maintain clear and consistent communication with BETF members through emails and follow-ups.

(1) Regular Updates and Reporting:

(a) Implement a structured communication plan that includes regular status updates, progress reports, and review meetings with the OBD Director and other stakeholders.

(b) Leverage project management software to share updates, track tasks, and ensure transparency.

(2) Stakeholder Engagement:

(a) Engage with BETF members and other stakeholders through regular consultations and feedback sessions.

(b) Utilize surveys, interviews, and focus groups to gather insights and ensure stakeholder needs are met.”

2. Implementation – Work Plan

Timeline for work plan shared in this RFP does not align with timeline for deliverables to the Legislature or the information stated in the RFP under Part II, A. TASKS subsection 1 and Part II, B. Deliverables subsection 4.

“The following is a realistic work plan for implementing the services for the Blue Economy Task Force (BETF) project over a 12-month period.”

**STATE OF MAINE
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BIDDER NAME: Camoin Associates

DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

“As one of the only full-service economic development consulting firms in the United States, with a long history in the northeast and Maine, Camoin Associates (Camoin) is well positioned to work with the State on this initiative. Our team will be bolstered by the Center for the Blue Economy (CBE), notably Charlie Colgan, who previously served as the Director of the University of Southern Maine Center for Business and Economic Research, among many other leadership roles across Maine.”

Right away they are identifying their SME, which is good.

“Our team is deeply engrained in Maine’s economic and industry landscape. This will significantly benefit this project as our team coordinates and prepares materials for the BETF.”

Previous project cited as relevant:

- State of Maine Ten-Year Economic Plan
- Maine Department of Economic Development (this is a typo, unfortunately)
- Maine Manufacturing Extension Partnership
- FOR/Maine
- MTI Industry Sector Assessment (somewhat relevant)

**STATE OF MAINE
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EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Food Economy Assessment and Action Plan (via FocusMaine)
 - Charlie Colgan (Center for Blue Economy) Projects:
 - Ocean Accounts for the United States
 - The Benefits of Ocean Observing Systems
 - Maritime Economy for Massachusetts
 - These are great projects, but mostly focused on the economic impacts of the marine economy, rather than higher-level strategy on how to grow the blue economy and how to talk about it.
 - He's also completed studies on the effects of climate change and sea level rise
2. Subcontractors
- Charlie Colgan, the Director of Research for the Center for the Blue Economy.
3. Organizational Chart
- Tori McNiff, Project Manager; Jim and Alex, senior advisors
 - Industry Expertise: Charlie Colgan
 - And two researchers
4. Litigation
- Camoin Associates has not been involved in any litigation over the last five years.
5. Certificate of Insurance
- Included

II. Proposed Services

1. Services to be Provided

Minimal description of Consultation – they could have at least regurgitated the list from the statute and added their own thoughts/ideas to that, even on a basic level.

“We understand that the client prefers these consultations to happen within the BETF meetings; however, if there is an opportunity to discuss

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

certain topics with stakeholders outside of the meetings, we believe there are ways to make the BETF meetings more efficient.”

The statute is clear that the Task Force will conduct these consultations. Thinking outside the box is great, but Camoin should have described in their proposal their idea for this work-around, that still satisfies the statute.

“BLUE ECONOMY DEFINITION - The blue economy is a term that has many different definitions around the world. Definitions generally contain mixtures of three elements: (1) the portion of the economy measured by output and employment that is related to the ocean; (2) the parts of the economy that develop and deploy new technologies related to the ocean; and (3) activities related to the conservation and restoration of ocean and coastal resources that maintain or increase the natural capital on which other activities depend. Each of these will be inventoried in Maine and compared with national and regional trends to assess Maine’s competitiveness.” I really like that they have a plan for this.

Data Review: yes, although the statute doesn’t talk about this very much;

“Ocean-related clusters exist in many locations around the country. The largest clusters are in San Diego, California; Southeastern Massachusetts; Harris County, Texas; Dade County, Florida; and King County, Washington State (Seattle). Numerous other smaller clusters have been identified through a NOAA-sponsored study called The Ocean Enterprise, a survey of marine technology related companies and clusters around the US. There are also a number of states with marine cluster development strategies, such as Alaska.” This is good detail here, solid. International case studies are similarly alluded to in a strong way.

They reference SEAMaine’s work on emerging sectors – this is good and shows a familiarity with the Maine ecosystem.

Legislative Letter – they’ve offered to present to the committee. Good.

2. Implementation – Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community
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- Really nice table in the work plan, and I agree with the flow of work.
- They've allocated several months to report preparation, which I also agree is required.
- March-June: team available for edits and consultation; great

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Compelling right out of the gate – “As one of the only full-service economic development consulting firms in the United States, with a long history in the northeast and Maine, Camoin Associates (Camoin) is well positioned to work with the State on this initiative. Our team will be bolstered by the Center for the Blue Economy (CBE), notably Charlie Colgan, who previously served as the Director of the University of Southern Maine Center for Business and Economic Research, among many other leadership roles across Maine. Senior Vice President at Camoin Associates, Jim Damicis, has worked together with Charlie over the last 30 years to evaluate Maine’s industry sectors and direct policy to leverage the state’s assets.”

Clearly shows their competence as an organization and ability to handle requirements of RFP.

Highlights four projects including the State of Maine Ten-Year Economic Plan, Maine MEP, DECD, and FOR/Maine. And then goes into details about working with MTI, MDF, FocusMaine

2. Subcontractors

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

“We will engage Charlie Colgan, the Director of Research for the Center for the Blue Economy. The Center for the Blue Economy is a research center of the Middlebury Institute of International Studies at Monterey”

Charlie is a leader in the industry and would do well working on the RFP.

Leading institution - “The Center is the leading research institution in the U.S. in the field of Ocean Accounting, the foundation for measuring the economic, ecological, and social aspects of sustainable blue economies.”

Already done work regarding Maine – “The Center has conducted two types of studies related to sea level rise and coastal communities. The first type is vulnerability assessments, identifying economic and infrastructure assets at risk. These studies have been done for the Mid-Atlantic states, San Diego County (California) and parts of Maine.”

Direct experience with Maine and this industry which addresses the requirements of the RFP.

3. Organizational Chart

I like that they showed the Project at the top (rather than a CEO). And the Principal and advisor are to the side of the project manager. Makes it seem like this is the most important.

Industry expertise from Charles Colgan.

Give full bios of team at the bottom which gives a good indication of projects they have worked on and individual expertise.

4. Litigation

- None

5. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Yes

II. Proposed Services

1. Services to be Provided

Broken down into five tasks directly from the RFP.

Under report I like that they try and define Blue Economy – “The blue economy is a term that has many different definitions around the world. Definitions generally contain mixtures of three elements: (1) the portion of the economy measured by output and employment that is related to the ocean; (2) the parts of the economy that develop and deploy new technologies related to the ocean; and (3) activities related to the conservation and restoration of ocean and coastal resources that maintain or increase the natural capital on which other 2 activities depend. Each of these will be inventoried in Maine and compared with national and regional trends to assess Maine’s competitiveness.”

Shows that they have already moved through the process and are ready to hit the ground running. This is an good example of taking initiative.

Proposes doing consultations outside of regularly scheduled meetings. The industry participants might not be okay with that.

2. Implementation – Work Plan

Light on details but the visual timeline is well done and really highlights when meetings are happening and what month each task will highlighted. Details would have been nice. Seeing more information under each task would have given more intel into how they plan to move through the process.

Also indicates that things would get down by March and that the team would continue to meet and be available for edits which gives ample time. **But the report is due February 1 by statute.**

**STATE OF MAINE
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DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Camoin outlines previous experience with work relating to the blue economy, as well as prior sector-specific projects.

They also highlight their ability to use economic data tools to inform the work:

"Camoin utilizes best-in-class data sources for our economic and market research to provide unparalleled insights into economic and industry opportunities. As research and data analysis leaders, we use the most advanced and comprehensive economic data and tools to understand the industry market trends, supply chain, and talent needs, and unearth emerging opportunities."

2. Subcontractors

If awarded, Camoin intends to subcontract the work:

"We will engage Charlie Colgan, the Director of Research for the Center for the Blue Economy. The Center for the Blue Economy is a research center of the Middlebury Institute of International Studies at Monterey, a graduate school of Middlebury College located in Monterey, California."

3. Organizational Chart

Provided.

4. Litigation

- None in the past 5 years.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Camoin Associates

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

5. Certificate of Insurance

- Provided.

II. Proposed Services

1. Services to be Provided

Clear information provided about services, with detail relevant to the RFP. Very high level with regard to the description of how consultation will be conducted. Would have preferred to see more information reflecting their understanding of the statute and its requirements.

Proposal also includes development of a one pager (per RFP) to illustrate results of the report:

“G. ONE PAGER – Our team will prepare content for a one-pager that distills the findings of the BETF Report into visually compelling graphics and narrative. The goal will be to use this as an educational and information tool that can be shared on social media and energize partners about the future of the industry. We will coordinate design, images, and photography for the document.”

2. Implementation – Work Plan

Work plan is provided and shown visually/by month leading to the date the report is due to be provided to the Governor and the Legislature. The plan includes a willingness to be available beyond the presentation of the report in February to assist with edits and consultation, which is good.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Fourth Economy

DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Firm out of Pittsburg: "Fourth Economy is a mission-driven consulting group that equips change agents with the tools to build better communities and stronger economies. Our extensive experience working on hundreds of projects informs our approach, guiding us to uniquely tailor and iterate each client engagement."

Previous experience includes:

"This experience includes serving as the consultant for the development of Rhode Island's 2030 Blue Economy Action Plan: GrowBlue, commissioned by the University of Rhode Island Research Foundation and currently supporting the Southeast New England Ocean Tech Hub's Phase 1 application and just completing a deep dive market analysis of the sector. We are also currently engaged with Maine Outdoor Brands and partners in the development of Maine's 10-year Outdoor Recreation Economy Roadmap."

The RI and the Southeast New England Ocean Tech Hub Phase 1 application is great experience and relevant to this scope of work.

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

“ a team experience in building consensus for an economic vision and supporting actions.” That’s good.

Equity Focus, actionable strategies to “correct imbalances.”

“This work has included research of blue economy clusters both nationally and worldwide, providing our firm with a high-level knowledge of cluster development activities occurring not only in US areas such as Seattle and San Diego, but globally, including England, the Netherlands, Singapore, and more.”

How they view the Blue Economy: Climate Health, Renewable Energy, Public Safety & National Defense, Sustainable Food Systems, Global and Domestic Marine Trade, Continued Ocean Research; this is a good list, and comprehensive

2. Subcontractors

None

3. Organizational Chart

- Rich Overmoyer, Sally Guzik, and others; experience and resumes are strong overall

4. Litigation

- There has been no litigation in the last 5 years

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Fourth Economy

DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

“We have also developed a NAICS-based definition of the sector which we can test and refine with Maine stakeholders;”

Their approach to the work is fantastic, but doesn't jive with what the statute requires; a general blue economy project would probably need exactly what they're proposing, but the statute doesn't include data analysis and equity considerations per se, nor does it delve into environmental factors specifically

Unique considerations for Maine including geographic diversity:

“Approach: Tailored data collection and analysis methods will be necessary to capture the full range of geographic diversity. This might involve region specific surveys, localized data collection efforts, and distinct analytical models to account for the differences between coastal areas.”

The statute does not reference region-specific surveys. I like this idea, but it's up to the Task Force to decide.

They reference addressing economic disparities, while this isn't in the statute. “This includes focusing on workforce development, equitable access to resources, and support for small and medium-sized enterprises (SMEs) in the blue economy.”

“Necessitating a more nuanced approach in Maine to ensure equitable development across all coastal regions.”

Nowhere did we say we wanted development across all coastal regions. That is almost the opposite of the way things work in Maine.

Their approach does not include Consultation as described in the statute and in the RFP, this is the bulk of the work needed.

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Overall, their approach is more of a generic blue economy project like they've done for other states (which is very strong) yet it's not consistent with what the statute is asking for, specifically.

"We will create a series of 'development sprint exercises' during the BETF meetings to allow us to build the deliverable as we go. The one challenge may be the availability of all members at all meetings and therefore we will assign pre-meeting homework and post-meeting review to ensure we are getting input from all members and building consensus." No. Busy business leaders don't have time for homework.

They include some generic recommendations based on their experience, but they include some things that are already happening in Maine, such as:

"Innovation and Technology: Maine has the potential to become a hub for blue economy innovation and technology. We can explore opportunities for attracting and retaining businesses and talent in the marine technology sector, including developing innovation clusters and supporting startups."

"We can align the BETF's strategies with the Maine Won't Wait climate action plan to ensure that economic development initiatives are environmentally sustainable." We did not ask for this in the scope of work, not specifically.

Review Key Reports list:

- » 2019: Maine Economic Development Strategy 2020-2029, a Focus on Talent and Innovation
- » 2020: Governor's Economic Recovery Committee: Recommendations to Grow and

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EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Sustain Maine's Economy

» 2023: Progress Report 1: 2020 - 2022

» 2024: Maine 2020-2029 Economic

Development Strategy: The 2024 Reset

» 2024: Workforce Attraction and Recruitment
Experiences of Maine Employers

This is an important list but limited and lacking other critical reports. Why isn't the Climate Action Plan on this list, and the SEAMaine roadmap and the offshore wind roadmap? They just pulled a list from one website instead of diving deeper.

They say they will establish a baseline.

"With this industry definition agreed upon, Fourth Economy will assess the current economic conditions of Maine's blue economy by gathering a wide range of quantitative and qualitative data to understand the economic contributions, employment patterns, and industry performance within key blue economy sectors such as fisheries, aquaculture, tourism, and marine technology."

This wasn't in the statute, though. Perhaps the second phase of the BETF, with additional funding, with include data analysis of this type.

Scope is great, but overly broad. It also includes a policy review, which we did not ask for.

2. Implementation – Work Plan

- Sufficiently detailed with milestones and tasks to be conducted in each month
- Tasks are consisted with scope of work described, above

**STATE OF MAINE
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RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Fourth Economy

DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

“Fourth Economy is a mission-driven consulting group that equips change agents with the tools to build better communities and stronger economies. Our extensive experience working on hundreds of projects informs our approach, guiding us to uniquely tailor and iterate each client engagement.”

Worked on Rhode Island 2030 Blue Economy Action Plan, Southeast New England Ocean Tech Hub Phase 1 Application, Maines 10 year Outdoor Recreation Economy Roadmap.

This experience relates well to our RFP.

Team of 5.

Section about their view of the blue economy is good insight into their ideas – Climate health, renewable energy, Public Safety and National Defense, Sustainable Food

Show how Maine is different than Road Island and how they will approach that. Feels like they have already been thinking about our RFP rather than regurgitating old information.

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

2. Subcontractors
None

3. Organizational Chart
Included. Detailed breakdown of each staff member

4. Litigation
Very Specific that they has been no litigation in the last 5 years. Makes me wonder if there has been litigation before that?

5. Certificate of Insurance
• Included

II. Proposed Services

1. Services to be Provided
Based on the 5 requirements in the RFP

Did their homework and indicated reports that would need to be considered.

“§ Report Review: Review key reports to ensure a comprehensive understanding of Maine’s economic landscape and strategic goals. This includes, but is not limited to: » 2019: Maine Economic Development Strategy 2020-2029, a Focus on Talent and Innovation » 2020: Governor’s Economic Recovery Committee: Recommendations to Grow and Sustain Maine’s Economy » 2023: Progress Report 1: 2020 - 2022 » 2024: Maine 2020-2029 Economic Development Strategy: The 2024 Reset » 2024: Workforce Attraction and Recruitment Experiences of Maine Employers”

Deliverables match the RFP, separate data analysis deliverables, Task force consultation deliverables, marketing and coms deliverables,

Starts with creating a definition. Have passed experience and would include definitions from other industry definitions offered in Maine.

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

SWOT analysis, Sector and Industry Analysis, Benchmarking, Policy
Analysis

Worry they might control the process and tell the task force how to move
rather than just facilitate and let the task force guide.

2. Implementation – Work Plan

Detailed into three phases. Near final copy of deliverables by Jan
24 for Feb 1 deadline

Purple is hard to read which makes me worried about stylistic
choices to convey report.

Each section broken down and clearly marked with a timeline.
Could have additional details.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Fourth Economy

DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Fourth Economy provides a comprehensive overview of their organization and experience, which includes very specific state-level blue economy work in Rhode Island:

"This experience includes serving as the consultant for the development of Rhode Island's 2030 Blue Economy Action Plan: GrowBlue, commissioned by the University of Rhode Island Research Foundation and currently supporting the Southeast New England Ocean Tech Hub's Phase 1 application and just completing a deep dive market analysis of the sector."

The Rhode Island experience is great and seems very applicable here.

2. Subcontractors

No subcontractors proposed.

3. Organizational Chart

Provided along with in-depth biographies. Experience seems strong on the team proposed to carry out the work.

4. Litigation

- No litigation in the past 5 years.

**STATE OF MAINE
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5. Certificate of Insurance

- Provided.

II. Proposed Services

1. Services to be Provided

Fourth Economy seems to have a clear understanding of what the RFP requires as to scope of services provided, however, they do not specifically describe the consultation work that is so important to the requirements of the statute.

They also share their understanding of what they perceive as potential challenges associated with the project, including the challenge of effective communication.

The proposal also includes a discussion of benchmarking against comparable states and regions:

“Our benchmarking process will evaluate Maine’s blue economy against comparable coastal states and regions, as well as internationally recognized blue economies. This comparison aims to identify effective strategies and areas where Maine can enhance its economic performance. By studying the formation of ocean clusters and strategic growth in states like Massachusetts and countries such as Norway, we will determine successful approaches and innovative practices that can be adapted to Maine’s context.”

2. Implementation – Work Plan

The work plan is provided and appears to be complete, with an understanding that statute requires deliverables in February of 2025. There is sufficient detail and tasks are broken out by month.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: HR&A Advisors

DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Jeff Hebert, New York, NY

"HR&A Advisors, Inc. (HR&A) is an employee-owned company working with our clients to create more equitable, resilient, and dynamic communities. For more than 40 years, we have served a diverse set of clients across the public, private, nonprofit, and philanthropic sectors, guiding them in planning and financing economic development strategies, set policy priorities, and transforming real estate and infrastructure, first into actionable plans then into job-producing, community-strengthening assets."

Previous Experience:

"On behalf of Rhode Island Commerce Corporation and the University of Rhode Island Research Foundation, HR&A Advisors supported the strategic planning process for the Rhode Island Blue Economy Technology Cluster (RI BETC)."

"On behalf of Newsday, HR&A Advisors analyzed future economic scenarios for Long Island that defined and envisioned a blue economy ecosystem."

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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“On behalf of the **City of Richmond, CA**, HR&A supported the **Richmond Green-Blue New Deal Workforce Development Plan** by analyzing existing conditions and identifying potential opportunities in the city’s green and blue economies.”

“HR&A supported Rhode Island Commerce through the state budgeting period to secure \$70M in funding commitments for blue economy investments in the Governor’s FY2023 budget.”

This is quite relevant, particularly considering that we spelled it out in the RFP: “HR&A Experience Spotlight – Legislative Support to Rhode Island Commerce to Secure \$70M in State Budget Commitments for Blue Economy Investments.”

This is relevant considering that RI’s state budget is similar to Maine’s.

“**Rhode Island** has already **secured additional federal funds** through the U.S. Economic Development Administration’s (EDA) Tech Hubs Program, with RI BETC continuing as Rhode Island’s Grow Blue Initiative and recently having been designated as the Ocean Tech Hub of Southeastern New England.”

They’ve done projects for Maine as well:

“HR&A is collaborating with State of Maine Governor’s Energy Office (GEO) and the Department of Economic and Community Development (DECD) in launching and managing a \$1.25 million ARPA funded Maine Community Energy Redevelopment Program (MECERP) Program, that leverages underutilized energy infrastructure statewide to unlock inclusive economic activity and create family-sustaining jobs connected to clean energy uses.”

“On behalf of the Maine Governor’s Office of Policy Innovation for the Future (GOPIF), HR&A leads an

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

analysis of housing needs and housing production gaps across the state.”

“On behalf of the Maine Connectivity Authority (MCA) and in conjunction with the Digital Equity Research Center (DERC), HR&A designed a research plan and analyzed the digital needs of Mainers by assessing a variety of data sources to inform strategies that meet residents’ needs, especially those who are most impacted by digital inequity.”

2. Subcontractors

Subcontractors will not be used as part of HR&A Advisors, Inc’s proposal.

3. Organizational Chart

- **Cary Hirschstein**, Partner-in-Charge
- **Shuprotim Bhaumik**, Collaborating Partner
Blue Economy Ecosystem on Long Island
- **Erman Eruz**, Project Manager
: Rhode Island Blue Economy Technology Cluster, Maine Community Energy Redevelopment Program (MECERP)
- **Marielle Saunders**, Analyst
Impacts of an Emergent Blue Economy Ecosystem on Long Island

4. Litigation

- HR&A Advisors, Inc does not have any current litigation in which HR&A Advisors, Inc is named or any closed cases that have closed within the past five (5) years.

5. Certificate of Insurance
Included

II. Proposed Services

1. Services to be Provided

- **Task 2 – BETF Consultation:** their description shows they have a solid understanding of the challenge at hand with seven meetings and all those consultations to do. They offer a few specific

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

strategies on how to tackle this challenge, including detailed agendas and solid project management.

- Task 3 – Report: “As part of our work on the Maine Community Energy Redevelopment Program (MECERP) Program with the DECD, we have closely reviewed Maine Economic Development Strategy and the Maine Won’t Wait climate action plan, as well as the more directly blue economy-related plans, including the Aquaculture Road Map, the SEAMaine Road Map, the SEAMaine Global Opportunities Assessment, and the Offshore Wind Road Map.” They’ve done their homework, which is good.

“We will help Maine reach an agreed upon definition of “blue economy” for the State, which reflects Maine’s unique assets and competitive strengths and includes references to the sectors or areas that rely on the sustainable use of ocean resources for economic health, improved livelihoods, jobs or ecosystem health. We will leverage our recent experience conducting this exercise for Rhode Island and Long Island, two of the East Coast markets that compete with Maine.”

“We will strategize with the BETF” that’s good.

“We will strategize with the BETF on how to position and differentiate Maine’s definition in the U.S. and globally. For example, as the world moves away from the traditional definitions of blue economy, which included fossil fuels, Maine may have expanded opportunity in highlighting its potential to use ocean resources for clean energy generation (e.g., using Maine’s leading position on floating offshore wind) and blue carbon sequestration (e.g., using Maine’s vast habitat of marshes, eelgrass beds and seaweeds).” This is also a very strong section, pleased they’ve thought about this for Maine.

“We plan to leverage insights like the one above to reach a recommendation about whether a state-level strategy, action plan, or other mechanism would better position the State to take advantage of opportunities identified in the report. We will also

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INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

evaluate what role could public funding, specifically state and/or federal appropriations, could play in helping Maine reach its fullest blue economy potential for equitable economic development, so support OBD's efforts to secure additional funding for blue economy." Agreed.

2. Implementation – Work Plan

- They listed the team, which is the same team as listed above.
- Work Plan is sufficient, with a table of tasks spread across the months; the work plan could have perhaps been more fulsome.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: HR&A Advisors

DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

I like that they put on a nice cover sheet.

“HR&A Advisors, Inc. (HR&A) is an **employee-owned company** working with our clients to create more equitable, resilient, and dynamic communities. For more than 40 years, we have served a diverse set of clients across the public, private, nonprofit, and philanthropic sectors, guiding them in planning and financing economic development strategies, set policy priorities, and transforming real estate and infrastructure, first into actionable plans then into job-producing, community-strengthening assets.”

Employee owned as another dynamic to their facilitation. Could Co-ops play a part in the future of the blue economy and how we transition our aging business owners??? Outside the scope of the RFP but interesting to think about.

“HR&A has recently led blue economy planning efforts in other parts of the East Coast, namely Rhode Island and Long Island, two of the regions that compete with Maine, helping them develop their definitions of “blue economy”. HR&A also conducted blue economy workforce studies in California.”

Good experience for the RFP. Both Maine/New England and more National.

List Four employees for the project with bios further down.

2. Subcontractors

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

None

3. Organizational Chart

Included. Has state of Maine at top which I like. Very clear, clean, and neat.

4. Litigation

- None in last 5 years or current. Does that mean there was some prior?

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

“Meeting Coordination: We will schedule and convene monthly BETF meetings via Zoom or Microsoft Teams, between July 2024 and January 2025. Our team will prepare and distribute meeting agendas at least one week in advance, ensuring that all necessary materials are available for BETF members to review.

- Documentation: During each meeting, HR&A will take detailed notes and record minutes to ensure accurate documentation of discussions and decisions. This documentation will be promptly distributed to BETF members and archived for future reference.

- Communication: HR&A will manage all email communications, ensuring that BETF members are kept informed of upcoming meetings, agenda items, and any changes to the schedule. We will also set up and manage calendar invites, incorporating meeting links and relevant materials.
- Content Creation: HR&A will provide content for website updates and social media posts, ensuring that the broader public and stakeholders are informed of the BETF’s progress and activities.”

I really like that they call out doing the content creation and communication. This indicates that they will not need to be micromanaged and will excel with what is listed in the RFP.

They spotlight the Rhode Island BE technology cluster. NYC industrial working group.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

"We will help Maine reach an agreed upon definition of "blue economy" for the State, which reflects Maine's unique assets and competitive strengths and includes references to the sectors or areas that rely on the sustainable use of ocean resources for economic health, improved livelihoods, jobs or ecosystem health. We will leverage our recent experience conducting this exercise for Rhode Island and Long Island, two of the East Coast markets that compete with Maine."

Sounds like they will work with the taskforce rather than tell what to do. Sounds like a guide rather than professor which is good.

Lots of examples from RI. Will look at other states, industries via sector analysis, comparative analysis.

2. Implementation – Work Plan

Included descriptions of which team member which was unique.

Timeline graph is not super easy to read. Poorly formatted to fit on page.

Seems thoughtful - "We propose these Monthly Progress Meetings to be staggered by two weeks with the monthly BETF Meetings, so that we can discuss lessons learned from the previous BETF Meeting, set the agendas and prepare for the upcoming BETF Meeting, and ensure timely follow-up on any decisions or actions require."

They already understand the dynamics and tight schedule. This is solid.

**STATE OF MAINE
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DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

HR&A outlines experience that includes blue economy work done recently in New England (Rhode Island)

“HR&A has recently led blue economy planning efforts in other parts of the East Coast, namely Rhode Island and Long Island, two of the regions that compete with Maine, helping them develop their definitions of “blue economy”. HR&A also conducted blue economy workforce studies in California.”

HR&A also highlights experience in state planning efforts in Maine:

“HR&A brings a strong understanding of the dynamics shaping Maine’s future, as we are actively engaged in a number of statewide planning efforts, ranging from leveraging underutilized energy infrastructure, to housing needs and digital equity.”

The directly relevant experience in blue economy work in another New England state is good to see. It appears that HR&A has been successful in securing funding to support the blue economy elsewhere, which may also be beneficial for the future of this work in Maine.

2. Subcontractors

No subcontractors proposed.

3. Organizational Chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Provided. The team size seems reasonable, though nothing particularly stood out to me as exceptional.

4. Litigation

No current litigation and none within the past 5 years.

5. Certificate of Insurance

Provided

II. Proposed Services

1. Services to be Provided

Outline of services is relevant to the RFP and demonstrates a clear understanding of the date of deliverables (2/1/2025).

Outside of monthly meetings, it appears project communication will occur primarily via email:

“Communication: HR&A will manage all email communications, ensuring that BETF members are kept informed of upcoming meetings, agenda items, and any changes to the schedule. We will also set up and manage calendar invites, incorporating meeting links and relevant materials.”

With a large group of stakeholders and a tight timeline, I would have preferred to see more detail about communication and how the project would be kept on track.

I like that they are aware of and had reviewed other plans/projects in Maine that relate to the blue economy.

2. Implementation – Work Plan

The provided work plan is complete and in line with the requirements of the RFP. It could have been more detailed.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Maine Development Foundation

DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

"Maine Development Foundation (MDF) was created by the Maine legislature in 1977 to "foster, support and assist economic growth and revitalization in Maine." We are well connected to public, private, and nonprofit leaders across Maine and have extensive experience managing projects to stay on time and on budget while meeting goals and deliverables and being flexible in the face of unexpected pivots. Our success comes from our deep commitment to listening and empowering stakeholders, our strong project management skills, our data-driven approach, our range of experience on staff, our many statewide networks, and our unwavering mission to advance economic vitality for Maine people."

"On this project, MDF will partner with Homarus Strategies as the content lead and Catherine deLutio of Maine Applied Research for a peer data review of the economic baseline work."

"MDF is committed to increasing the economic vibrancy of Maine. Our work, no matter the sector or location, puts the people of Maine first. Projects like this allow us to convene stakeholders and dive deeply into a sector with those who know it best. Our process will rely on activating the wisdom and experience of the BETF members and other individuals and entities involved in the blue economy." YES. Listening to BETF is critical here.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Maine Development Foundation

DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Project experience listed: SEAMane (MTI as client); MA Division of Marine Fisheries (Homarus Strategies) – ropeless gear/lobstering; CA State Senate (Homarus Strategies was hired by California Senator Mike McGuire (now the Senate President Pro-Tempore) to lead the activities of the California Legislature’s Joint Fisheries and Aquaculture Committee during the second half of 2022.)”

The MDF experience is good, Homarus’ is average quality.

2. Subcontractors

Homarus Strategies (Noah Oppenheim).

“Homarus Strategies will:

- Synthesize existing studies and roadmaps,
- Benchmark practices and priorities at the international, national, and state level as guided by the BETF and key stakeholders,
- Ensure connection to the state’s key planning documents, the *Maine Economic Development Strategy* and *Maine Won’t Wait*, and
- Write the report in sections, giving the BETF the opportunity to provide feedback and edits throughout the process.” This seems very clear and also simple, which is a strength for this project.

What will Maine Applied Research do? It is not mentioned anywhere in their proposal, which is confusing.

3. Organizational Chart

- Included, a detailed one for MDF. Roles and responsibilities for some of the project work is included as footnotes.
- It would have been good to see an org chart for the project within the work plan.

4. Litigation

- I think they indicated in the submission email that they have no litigation.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

They've referenced BETF chairs, which is interesting. Not sure there will be chairs. Nothing in the statute indicates there would be.

As stated in the RFP, OBD will be approving agendas, etc.

They've suggested:

"One-on-one meetings with task force members, Small-group check-ins for various sub-sectors, and Ongoing awareness of sector news that may affect the BETF work." Not sure that will work.

"We recommend continuing to coordinate BETF meetings through March, April, and May to: Facilitate discussions on blue economy branding, potentially in partnership with Blaze Partners given their engagement with Maine's 10-year economic plan." This is overreach, considering that any budget for initial branding has been clearly included in this scope of work, to be done by this vendor, and it's not appropriate to suggest specific future vendors for State-procured work.

They've referenced the 10-year EDS and Maine Won't Wait, which is appropriate, but it might have been nice to see the SEAMaine in there as well and perhaps the Offshore wind road map.

2. Implementation – Work Plan

- Quite simple and straightforward.
- Gantt chart included as a separate document, which is helpful.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 6/27/24

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

- Other than Homarus Strategies, it doesn't indicate who else will be involved – what will Catherine do? She is the other subcontractor, but it's unclear what she'll do.
- Phase 4 of the project includes extra tasks not included in the RFP:
 - Phase 4 - Next steps & delivering the message
 - Blue Economy branding workshop
 - BETF 2025/26 focal area planning
 - BETF road show planning
 - BETF road show implementation

Our preference is that vendors stick to the tasks described in the RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Maine Development Foundation

DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

"Maine Development Foundation (MDF) was created by the Maine legislature in 1977 to "foster, support and assist economic growth and revitalization in Maine." We are well connected to public, private, and nonprofit leaders across Maine and have extensive experience managing projects to stay on time and on budget while meeting goals and deliverables and being flexible in the face of unexpected pivots."

Information about organization but not about how they relate to RFP.
Information could be used for any Maine focused RFP (not tailored to this RFP).

"The Economic & Community Development staff at MDF include experienced facilitators, grant writers, grant managers, project and program managers, and budget and finance experts, all of whom can tap into a project if their skill set is needed."

2. Subcontractors

"On this project, MDF will partner with Homarus Strategies as the content lead and Catherine deLutio of Maine Applied Research for a peer data review of the economic baseline work.

Homarus Strategies (noah@homarus.co, 207-233-0400) has been in the business of providing policy analytical services in support of coastal communities since its formation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

in March 2020. Based in Brunswick, Homarus has served diverse clients including SEA Maine, the Island Institute, the Massachusetts Division of Marine Fisheries, the California State Legislature, the Aleut Community of St. Paul Island Tribal Government, and over a dozen other for-profit and nonprofit clients operating in the fisheries, seafood, and maritime industries. Homarus Strategies' Principal Consultant Noah Oppenheim has supported coastal economic development on the East Coast, the Gulf of Mexico, the West Coast, and Alaska and has directly supported the development of tens of millions of dollars in federal appropriations through research and advocacy. Prior to establishing Homarus, Oppenheim led a commercial fisheries trade association on the West Coast; managed the oceans, energy, climate, and federal lands portfolios for a Member of Congress; and studied lobster population dynamics.

Catherine deLutio (Kate@MaineAppliedResearch.com, 207.808.1045), principal of Maine Applied Research and a former economist for the state of Maine, has spent nearly two decades providing high quality, independent research and data analysis to Maine leaders in government, business, philanthropy, and the nonprofit sector. In partnership with MDF and the Maine Economic Growth Council, she researches the annual Measures of Growth report."

I like that Catherine is the former economist for Maine. That would be a good skill/perspective for the working group. Homarus seems to have good experience/expertise in the Blue Economy which improves the application.

3. Organizational Chart

Complicated to read. Red highlights show organization who would be working on this project and their role is in the bottom left.

Little description of MDF staff and who specifically we would be working with. While they indicated the personnel, we do not get a good sense of their strengths and why they were selected.

4. Litigation

- Not indicated in application but was in email submission

5. Certificate of Insurance

- Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

II. Proposed Services

1. Services to be Provided

I like that they include "Provide DECD with regular updates for the website and social media,"

Seem to be focused on the future rather than just the one year initial option of the RFP. Specifically I like discussion of branding

"Coordination of next steps

We recommend continuing to coordinate BETF meetings through March, April, and May to:

- Facilitate discussions on blue economy branding, potentially in partnership with Blaze Partners given their engagement with Maine's 10-year economic plan,
- Develop a plan for implementation or further study topics in 2025-26, and
- Coordinate outreach about the finished plan that engages key BETF members and targeted agencies/stakeholders."

Little thing but submissions are not all included in one document (org chart, insurance, etc in multiple pdfs which is harder to review.

2. Implementation – Work Plan

Very pretty work plan graph. Color coded and clear. MDF in Blue, Homarus in Red and both firms represented by purple.

Timeline is detailed by 4 phases but the kick off is not until September. Prior to that is meeting with DECD and BETF Chairs, baseline research etc.

Overall a little more detail would have been appreciated.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: Maine Development Foundation

DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Maine Development Foundation provides an overview of their work and the background on their organization. There is very little reference to blue economy work, nor to specific expertise in this area.

2. Subcontractors

Two subcontractors would be involved as proposed: Homarus Strategies and Catherine deLutio. I would have liked to have seen additional information about the subcontractors and their specific expertise relative to the project.

3. Organizational Chart

Provided. Did not seem to be specific to the RFP, but rather an overview of MDF's organization. This may be fine.

4. Litigation

No information on this provided.

5. Certificate of Insurance

Provided.

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Outline of services to be provided is sufficient, but I would have liked to see much more detail about the steps/process MDF plans to use if awarded the funds.

There is a mention of providing updates for both DECD's website and social media during the meetings phase of the project:

"Throughout this stage of the project, MDF and Homarus Strategies will meet regularly to:

- Keep the content work, stakeholder engagement, and project timeline in sync;
- Prepare for monthly BETF meetings;
- Provide DECD with regular updates for the website and social media, and
- Plan individual meetings with stakeholders as needed, whether because of scheduling needs, stakeholder participation level, or the need to elicit one-on-one feedback in a less public setting."

I like this, as I think communicating the value and results of the work will be very important.

Proposal appears to include a recommendation for continuing the work beyond the scope and requirements of the RFP:

"Coordination of next steps

We recommend continuing to coordinate BETF meetings through March, April, and May to:

- Facilitate discussions on blue economy branding, potentially in partnership with Blaze Partners given their engagement with Maine's 10-year economic plan,
- Develop a plan for implementation or further study topics in 2025-26, and
- Coordinate outreach about the finished plan that engages key BETF members and targeted agencies/stakeholders."

This feels like an overreach to me. The RFP has clear requirements and to be proposing additional work beyond that before the RFP's requirements are met and work completed does not seem appropriate. Further, I worry about the naming of specific firms for additional work when we have a procurement process in place at the State level to ensure fairness.

2. Implementation – Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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Development

Proposed work plan timeline is in line with the requirements of the RFP. The color coding was confusing to me and I would have liked to see much more detail about tasks.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Michael Conathan Consulting, LLC

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Firm out of South Portland; "He is a member of the New England Ocean Cluster and operates his business from the NEOC office on the Portland waterfront."

"Conathan currently works as an independent consulting business supporting clients that have included the Ocean Foundation, Environmental Defense Fund, the U.S. Department of Energy, the World Bank, the New England Aquarium, the Sustainable Ocean Alliance, and several Blue Economy start-ups in the private sector."

Substantial previous blue economy work, primarily involving conservation. Less experience with economic development.

There was a project with Builds Initiative for blue economy cluster development.

Aspen Institute project – CO2 removal

Sustainable Ocean Alliance

2. Subcontractors

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

SAMBAS Consulting, LLC (Cumberland Foreside) – Laura Singer (will serve as facilitator) – off-shore wind, Maine Climate Council
BioHarbor Strategies LLC (Ogunquit) – Dana O’Brien (“Dana will apply his unique policy, political, and communications acumen broadly across the project to ensure the BETF report is compelling, and its recommendations are pragmatic and achievable.”)
Center for the Blue Economy, Middlebury Institute of International Studies at Monterey (CA) – Charles Cogan (“He and his Research Associate Tony Castelletto will serve as subject matter experts for the Task Force, supporting and participating in research, consultations and discussions. They will provide critical background information and data to support the Task Force’s recommendations and contribute significantly to development of the BETF Report.”)

If these subcontractors are doing all of this work as subcontractors, what will the lead contractor do? Okay, this is answered on page 12 with their org chart.

Feels like too many cooks in the kitchen here. Would they all be in the BETF meetings asking questions and providing expertise/commentary?)

3. Organizational Chart

Michael Conathan Team Lead and Contractor with DECD/OBD
Subject Matter Expert

Lead: Tasks 2, 3, and 5

Contributor: Tasks 1 and 4

Laura Singer Project Manager

Leads: Tasks 1, 2, and 5

Contributor: Task 3

Charles Colgan Subject Matter Expert

Lead: Task 3

Contributor: Tasks 2 and 5

Dana O’Brien Subject Matter Expert

Lead: Task 4

Contributor: Tasks 1, 2, 3, and 5

Tony Castelletto Subject Matter Expert

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

4. Litigation

Michael Conathan Consulting LLC is not named in any current litigation and does not have cases closed within the past five (5) years in which Michael Conathan Consulting LLC paid the claimant either as part of a settlement or by decree.

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

They suggest a half-day kick-off meeting and another in-person meeting for the BETF.

“BETF co-chairs” are referenced. This was not alluded to or described in the RFP.

“Creating two types of agendas for each meeting 1) a general public agenda and 2) a detailed annotated agenda for internal coordination. OBD will approve all final agendas.” It was never mentioned that agendas would be public in the statute or RFP. Whoever has prepared this is assuming this would be like other task forces they’ve worked on (e.g., Climate Council).

They’ve suggested meeting reports – once again, this was not listed as a task in the RFP. Notes for the meetings are sufficient.

“September meeting to include consultations with public agencies, research and academic organizations, and Indigenous representatives and Tribes. October meeting to include consultations with trade associations, investors, industry members, and marine economy representatives.”

I like that they’ve described a specific approach to the Consultations.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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“In suggesting this plan, we remain concerned about the limited time to consult with the identified list of stakeholders,” yet the legislature was clear on the timing.

“The largest ocean clusters are in San Diego, California; Southeastern Massachusetts; Harris County, Texas; Dade County, Florida (Miami); and King County, Washington State (Seattle).” Good, although not sure Maine is a peer state to any of these states.

“As with states, there are a large number of countries involved in blue economy development and clusters. These include Canada, the United Kingdom, Norway, Australia, and the Republic of Korea.”

“State government is a key part of clusters supporting institutions like the university and Maine Technology Institute as well as key agencies such as DMR and Parks and Lands. State government, as owner of submerged lands, is the largest landlord in the coastal zone.”

Narrative rambles a bit at times but the content is solid.

“Creating a **communications plan** to include the development of compelling messages, the identification of messengers, audiences and delivery methods, and the drafting of all public facing collateral accompanying the BETF report (e.g., a **one-page summary** of the report, an **infographic**, **talking points**, etc.).”

The RFP included only a one-pager and info for the website. A communications plan could be part of further projects.

“Creating an **implementation roadmap** to include the list of BETF report recommendations and a suggested path to making progress on them in the near-term (e.g., legislative or regulatory changes and proposed text, public funding needs, community relations investments, etc.).”

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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Not sure about this. This isn't a "roadmap" effort per se. That wording was not used in the statute or the RFP. Also, the statute does not include a policy review or legislative recommendations as an output.

2. Implementation – Work Plan

Timeline is clear and thorough; however, they've suggested 2-, 3-, and 4-hour meetings which may not be desirable or efficient for busy businesses.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Has a cover page but it is not engaging. Very plain...

"Conathan will serve as the contract administrator and primary subject matter expert for the work of the Blue Economy Task Force. He is an ocean policy specialist with over 18 years of experience driving action on international, federal, and regional marine and maritime initiatives."

Impressive list of clients "Conathan currently works as an independent consulting business supporting clients that have included the Ocean Foundation, Environmental Defense Fund, the U.S. Department of Energy, the World Bank, the New England Aquarium, the Sustainable Ocean Alliance, and several Blue Economy start-ups in the private sector."

Has done work in the past on US senate subcommittee on oceans, atmosphere, fisheries and coast guard working supporting Sen Snow.

Really like that he is a member of the New England Ocean Cluster. Gaining insight into this Maine sector just by going to the coworking building. Being around many other sector players would have immediate knowledge/understanding of the challenges at hand.

2. Subcontractors

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Excellent subcontractors. Really diverse and quality team. Brings expertise needed for RFP.

Sambas Consulting (Cumberland) – Laura will be project manager

“Laura has worked in the Gulf of Maine in areas of coastal management, marine research, and environmental policy for over three decades and brings a broad perspective of the nexus among public, private, academic, and non-profit sectors.”

BioHarbor Strategies LLC (Ogunquit)

“Dana will apply his unique policy, political, and communications acumen broadly across the project to ensure the BETF report is compelling, and its recommendations are pragmatic and achievable.”

Dana served as the President of Focus Maine. Was a member of SeaMaine.

Center for the Blue Economy, Middlebury Institute (CA)

“Dr. Charles Colgan is a renowned economist and one of the foremost global experts on the blue economy. He served three Maine Governors in the State Planning Office and held positions both as the Director of the Maine Coastal Program and State Economist before beginning his academic career at the University of Southern Maine.”

3. Organizational Chart

Shows DECD at the top above BETF. Then the four groups all at the same level below. Already stated the Michael will be project coordinator.

4. Litigation

- No, but only says that Michael Conathan Consulting has not and not any of the subcontractors. Mentions in the last five years but does not speak to before that.

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

All Maine Based.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

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EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

Each task broken down to lead and contributors for the four parties.
Recommends two in person meetings rather than all virtual for task force. First and in December.

I like how the speak about facilitation with real outcomes

“As defined in statute, the Task Force will include a diverse mix of interests and perspectives about Maine’s blue economy and opportunities for growth. Meeting facilitation will guide constructive dialogue during Task Force meetings and throughout the process using a variety of approaches. During the refinement of the meeting agenda, we will discuss the facilitation methods with the planning team and anticipate what tools may be most useful. Facilitation will ensure:

- objectives of the meeting are clear,
- participants are engaged in joint learning and sharing of information,
- everyone has an opportunity to contribute to the discussion,
- ideas and views are synthesized to foster real-time dialogue and deliberation
- meetings stay on schedule.”

Seem to have knowledge about other state locations as well as countries to meet the requirements of the RFP.

2. Implementation – Work Plan

A little confusing with the whole task being bold. But answers are clear and well articulated to the RFP.

Timeline makes sense and is detailed.

Two phases, pre report and post report

Calls out BERF meetings and how long they recommend (2 hours verse half day).

Would have organizational capacity to do the RFP work.

**STATE OF MAINE
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DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

The overview includes details of Michael Conathan's experience relating to blue economy work, including work at the national level:

"Development of BlueTech and Ocean Clusters in the United States, 2020-present. This project of The Ocean Foundation, supported by a national philanthropic foundation, has focused on incentivizing the development of ocean and blue tech cluster organizations in the U.S. through policy education and advocacy at the federal level, and organization of ocean cluster leadership throughout the country. This has also included review and research of Blue Economy development policies internationally. Specific deliverables are described in PROJECT 1 below.

● Other Relevant Blue Economy Work:

- Invited witness before the U.S. Senate Committee on Commerce, Science, and Transportation at a Hearing on "Our Blue Economy: Successes and Opportunities," March 27, 2019. (Written testimony; Full hearing record)
- Developing a Blue Economy in China and the United States, Report, Center for American Progress, May 2015. Led a convening of 20 interdisciplinary Blue Economy experts from the United States and China for a 3-day conference in Honolulu, HI, in June 2017–Blue Future: Mapping Opportunities for U.S.-China Cooperation, Report, Center for American Progress, published May 2018.
- The Foundations of a Blue Economy, program launch, Center for American Progress, 2012. Led establishment of a new project focused on promoting industries that

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

recognize and augment clean and healthy ocean, coastal, and Great Lakes ecosystems is crucial to America's financial, biological, cultural, and spiritual well-being."

This team has clear experience in blue economy, and the national-level involvement in particular is impressive.

2. Subcontractors

Three subcontractors proposed: Laura Taylor Singer, Dana O'Brien, Charles Colgan. Each has experience relevant to the RFP and blue economy.

3. Organizational Chart

Provided.

4. Litigation

None in the past 5 years.

5. Certificate of Insurance

Provided.

II. Proposed Services

1. Services to be Provided

Outline is comprehensive. Proposal differs from RFP regarding meeting format:

"While we acknowledge that DECD/OBD stated in response to a question that "it is anticipated that all meetings will be virtual," (see Question 6, RFP202405101 Questions & Answers Summary) we recommend that as many Task Force members as possible gather in person on two occasions during the contract, while the remainder of meetings and all consultations would be virtual. In-person meetings foster constructive working relationships and often help bring the group together to gain agreement in difficult moments of decision. Specifically, we suggest an in-person half-day kick-off meeting to 1) build agreement and clarity around the mandate and proposed work plan for the BETF; 2) provide essential context for the work; and 3) offer an opportunity for interaction and relationship building. This in-person kick-off will allow the Task Force to use the efficiencies of virtual meetings for work in the subsequent months."

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

I note that following this piece of the proposal, Task 5 in the outline states that meetings will be held via Zoom and kept as close as possible to 30 minutes in length, as outlined in the RFP. The detailed timeline shows a mix of in-person and virtual meetings, of varying lengths. We would need to reiterate expectations about meetings before launching if this group were awarded the funding.

The outline for Task 3 appears to show several somewhat pre-determined “answers” relating to content of the report. This seemed out of step, given the RFP’s requirements for consultation and involvement of the stakeholder group.

2. Implementation – Work Plan

The work plan provided is aligned with the timeline in the RFP, including the deliverable due February 2025 to the Legislature. Detail is sufficient and clear.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: MustardSeed PMO

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Firm out of West Chester, PA

"MustardSeed is a certified small business providing project management services to the life sciences industry. Since our founding in 2021, MustardSeed has provided over \$2.5 million in project management services to 30 clients."

"MustardSeed's combination of rapid learning, stakeholder management, and strategic planning capabilities, coupled with our experience in managing complex projects in highly regulated industries, makes us ideally suited to support the Blue Economy Task Force.

We are prepared to help Maine emerge as a center for blue economy innovation and opportunity in the 21st century, aligning with the State's vision for 2030."

Not sure what vision they're referring to... EDS or climate?

Previous project experience is life sciences and biotech.

Previous experience and expertise in blue economy is limited to non-existent.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: MustardSeed PMO

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

2. Subcontractors

MustardSeed will not be working with any subcontractors for this project.

3. Organizational Chart

Included, led by Stephen Curry

The lead SME: “Our strength lies in our staff, and our lead subject matter expert (SME), **Ms. Kylie Cannon (PMP, MPA)**, brings a wealth of economic development knowledge to this project. Ms. Cannon has deep experience in both project management and economic development practices in the public sector. Her graduate studies and past work include research on industry clusters and training in economic development finance from the National Development Council (now Grow America). As a Community Planner with the U.S. Department of Transportation’s Build America Bureau, Ms. Cannon spoke as a panelist about public-private partnerships and government financing opportunities at national conferences of state and local government audiences.”

I don’t see any blue economy experience here. The RFP was clear that this was needed.

4. Litigation

MustardSeed is not named in any current or past litigation.

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

“MustardSeed specializes in highly technical project management services for the life sciences industry. The Blue Economy Task Force (BETF) is, at its

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Manager and Subject Matter Expertise

BIDDER NAME: MustardSeed PMO

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

core, a life sciences project – one focused on leveraging Maine’s rich maritime heritage to accelerate economic development and environmental sustainability. MustardSeed brings expertise in managing complex, multi-stakeholder projects while rapidly adapting to complex new subject areas. Our goal is to work with the BETF to deliver a transformative roadmap that will position Maine as a leader in the national and global blue economy landscape.”

Boatbuilding, lobstering, and offshore wind are not life sciences.

Proposal describes specific delivery tools.

Task Summary table included.

“

Meeting 1 (July 2024) – Project Kickoff; Defining “Blue Economy”; Branding Ideation

- Meeting 2 (August 2024) – Stakeholder Mapping and Preparation for Consultation
- Meeting 3 (September 2024) – Consultant Interview Session #1
- Meeting 4 (October 2024) – Consultant Interview Session #2
- Meeting 5 (November 2024) – Review BETF Draft Report
- Meeting 6 (December 2024) – Review BETF One-Pager; Draft Legislative Letter
- Meeting 7 (January 2025) – Finalize Legislative Letter “

The BETF meetings should be devoted to the Consultations described in the statute, not collaborate work meetings to help the consultant revise and finalize deliverables.

“To establish a more robust set of consultations, we recommend holding an hour of at least two, and possibly three, monthly meetings to conduct these workshops.”

This is beyond the frequency requested in the RFP.

“We will conduct a thorough review of existing literature on: (1) the blue economy landscape, both nationally and internationally;”

**STATE OF MAINE
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It is hoped that the consultant hired to do this work is already a subject matter expertise on national and international blue economy topics and will not require project time to come up to speed on these topics.

“

- Maine Economic Development Strategy 2020-2029, a Focus on Talent and Innovation o 2020-2022 Progress Report
o 2020-2029 Economic Development Strategy
- Governor’s Economic Recovery Committee: Recommendations to Grow and Sustain Maine’s Economy
- *Maine Won’t Wait* 4-Year Climate Plan
- Coastal Counties Workforce Development Board Fact Sheets
- National Oceanic and Atmospheric Administration (NOAA) State of the U.S. Ocean and Coastal Economies Report”

Not quite the right list, which is okay but shows a limited understanding of Maine’s current blue economy work and stakeholders (SEAMaine, offshore wind...)

“We will utilize AI for an initial document scan to create efficiencies and ensure our data analysis is focused on the most relevant reports, data, and case studies.” Not for the State of Maine.

Deliverable is Blue Economy Roadmap. No. The deliverable is titled according to statute and is not a roadmap.

Overall, the scope of work described highlight’s this firm’s lack of experience with blue economy topics and lack of experience with Maine.

2. Implementation – Work Plan

Timeline is clear and thorough; however, they’ve suggested 2-, 3-, and 4-hour meetings which may not be desirable or efficient for busy businesses.

Detailed Gantt chart is helpful.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202405101

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BIDDER NAME: MustardSeed PMO

DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Okay cover page. I like that they did prepared for and prepared by.

"MustardSeed is a certified small business providing project management services to the life sciences industry. Since our founding in 2021, MustardSeed has provided over \$2.5 million in project management services to 30 clients."

Newish company. Does not give specifics as to how they are experts in the Blue Economy/project facilitation.

Generic qualifications that they probably use over and over for other RFPs. Consensus building, Strategic planning, commitment to equity etc.

Examples are not of sector planning

2. Subcontractors

None

3. Organizational Chart

Org chart provided with BETF sitting under CEO. Kylie and Stephen both have write ups about them and CV

Nice that they call out which of the RFP tasks each person will be responsible for.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

4. Litigation
 - Not names in any current or past litigation
5. Certificate of Insurance
 - Included

II. Proposed Services

1. Services to be Provided

“MustardSeed specializes in highly technical project management services for the life sciences industry. The Blue Economy Task Force (BETF) is, at its core, a life sciences project – one focused on leveraging Maine’s rich maritime heritage to accelerate economic development and environmental sustainability.”

LiveScience’s are not the only part of the Blue Economy. Does not speak to how they can relate to the other industries within the Blue Economy.

Seems very cookie cutter which is not what our RFP is asking for. Our needs are unique.

They recommend 2 hour meetings with at least half hour for internal business.

2. Implementation – Work Plan

Work plan implementation graph is confusing and hard to read. I like multiple colors but font is so small it is difficult to decipher.

Quarterly web content is a nice deliverable.

Keep saying that they will work with OBD Director to ____ which is either nice and thoughtful or it is going to be more work for CM
“5.1 Monthly Progress Meetings MustardSeed will work with the OBD Director to develop a set of key performance indicators to track project progress”

**STATE OF MAINE
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Development

Thoughtful to have everything match previous

“The Legislative Letter will share a concise, compelling summary of the BETF’s key findings and recommendations. As we draft the letter, **we will review public records for similar Legislative Letters delivered** in the State of Maine to ensure the tone and structure are consistent with the expectations of the legislature.”

Say they will draft letter several months in advance of delivery date. Work plan calls for November. Is that too ambitious? The point of the RFP is to get listen to the working group. Worry that they would have to just create the report with only their thoughts and limited input from task force.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: MustardSeed PMO

DATE: 07/08/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

MustardSeed's experience seems to be in the project management sphere in the life sciences sector:

"MustardSeed is a certified small business providing project management services to the life sciences industry. Since our founding in 2021, MustardSeed has provided over \$2.5 million in project management services to 30 clients. We serve clients across the life sciences spectrum, from disruptive biotechnology startups to global pharmaceutical manufacturers. Our rapid growth – our team has tripled in the last three years – reflects our ability to adapt rapidly to new challenges across various industries, including biotechnology, healthcare, and sustainable technologies."

There does not appear to be any blue economy-focused experience, really, and that is problematic. Project management is a big part of this work, but understanding the blue economy space is critical.

2. Subcontractors

No subcontractors proposed, which is potentially problematic since there should be a global blue economy expert involved, per the RFP.

3. Organizational Chart

Provided. Team seems sufficient but there is no blue economy work experience evident; the RFP was clear that this is required.

**STATE OF MAINE
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4. Litigation

None.

5. Certificate of Insurance

Provided.

II. Proposed Services

1. Services to be Provided

Outline of services to be provided is almost too high-level. The proposal mentions that the it is the opinion of MustardSeed that the project is a life sciences project and that they hope to deliver a transformative blue economy roadmap:

“MustardSeed specializes in highly technical project management services for the life sciences industry. The Blue Economy Task Force (BETF) is, at its core, a life sciences project – one focused on leveraging Maine’s rich maritime heritage to accelerate economic development and environmental sustainability. MustardSeed brings expertise in managing complex, multistakeholder projects while rapidly adapting to complex new subject areas. Our goal is to work with the BETF to deliver a transformative roadmap that will position Maine as a leader in the national and global blue economy landscape.”

The role of the consultant in this project is to lead consultation and work with the stakeholder group as they meet the requirements of the statute. The RFP seeks a report with some recommendations pursuant to statute. This goes beyond what the RFP outlines and what statute requires, yet (in my opinion) the proposal does not give clear enough indication of the process that will be used to do any of the work.

The communications aspect of the proposal is brief. Given tight timelines and a large group of stakeholders, I would have liked to see more detail on how communication would be managed.

2. Implementation – Work Plan

The timeline is detailed and includes more mention of development of a Blue Economy Roadmap. It appears that the proposal intends to deliver the draft and final reports in

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November/December which aligns with the requirement of the RFP to provide said report to the Legislature by February 1, 2025 as noted in statute.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Steamboat Road Consulting

EVALUATOR NAME: Charlotte Mace

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Jason Mitchell

Steamboat Road Consulting (SBRC) is a Maine-based management consulting firm with extensive experience in the aquaculture, maritime, and manufacturing sectors. Our portfolio ranges from:

- Start-ups to Commercial Enterprises: From small shellfish and seaweed start-ups to commercial marine renewable power companies, we tailor our strategies to meet the unique needs of each client and achieve results.
- Local to International: Our services extend from a local focus in Maine to clients across the U.S. and beyond, giving us an understanding of both regional and global blue economy dynamics.

Norfolk Green Ventures (NGV), the venture arm of Steamboat Road Consulting, underscores our commitment to the blue economy with our focus on enhancing the seaweed value chain.

Our portfolio consists of 11 companies in total. Two of the companies are Maine based, an additional 4 are domestic, and the remaining 5 are international.

Steamboat Road Consulting (SBRC) has strong relationships with Maine's top institutions, trade associations, and key players in the blue economy. Our work with organizations such as Maine Center for Entrepreneurs, The Nature Conservancy of Maine, Sea Ahead, The University of Maine, and

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

the Roux Institute highlights our ability to engage effectively with a wide range of partners.

Leveraging our extensive network, industry expertise, and commitment to sustainability, SBRC is well-positioned to manage the BETF consultation process, fostering effective collaboration across all sectors of the blue economy.

- Venture arm
- TNC
- Strong project management expertise
- Systems based approach
- Previous experience/projects listed include MCE, TNC (not as relevant), ORPC, Whole Oceans (“**Deployed \$10 million** to bring the project from concept to shovel-ready in 16 months
- and growing the company valuation by 6X” – what?!), Greenhead Lobster
- Would like to see global marine economy experience, not just Maine.

2. Subcontractors

Steamboat Road Consulting does not plan to use any subcontractors for this scope of work.

Who will do the economic baseline?

3. Organizational Chart

Well-organized.

Looks like Jason Mitchell is the SME, and there are two other project managers – is this just their title or will they be the project managers for the project? Wish that was spelled out better

Another SME who specializes in marine manufacturing

Another SME in aquaculture

4. Litigation

Steamboat Road Consulting (SBRC) is not currently named in any litigation. SBRC has not

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

paid the claimant of any closed cases within the past five (5) years, either as part of a settlement or by decree.

5. Certificate of Insurance

- Included

II. Proposed Services

1. Services to be Provided

“SBRC will leverage the Project Management Institute’s (PMI) standards of project management to lead the BETF to meet the statute’s requirements and produce a report that will define and baseline Maine’s blue economy and recommend strategies for economic growth and innovation.”

- Roles of the team are clearly defined in this section, good.
- “On a short-duration project like this, it is crucial to begin early and prioritize tasks to accommodate any unforeseen challenges.” Yes, agreed

“Define Clear Project Objectives: Establish key performance indicators (KPIs) to measure success. Create a preliminary outline of the final BETF report, based on existing reports and data to provide a vision of the final product and identify knowledge gaps for the BETF’s focus.”
The KPIs and report outline is defined in the statute, so not sure why they’re suggesting this.

“Utilize Networks: Leverage SBRC and BETF networks to engage key stakeholders, including relevant state agencies, publicly funded institutions, trade associations, blue economy businesses, and investors.”
Or they could have used the Consultation list from the statute... which mentions tribes, for example.

“Evaluate Maine’s blue economy sectors reliant on sustainable ocean resources, identify climate change threats, and assess workforce development needs.”
They must not have read the statute. Identifying climate change threats is already being done and really well – by GMRI and others. This work does

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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not include this. Workforce development needs are also not included in this scope of work.

This is what they say for the report: “Develop a comprehensive report to define and baseline Maine’s blue economy and recommend strategies for economic growth and innovation based on the activities of the BETF and existing studies and State/industry strategies.” This should have been worded more consistently with the statute.

“In conducting its duties under this section, to the extent practicable, the task force shall focus on business opportunities, economic growth and research and technology transfers, including growth opportunities for businesses in the State as well as opportunities to attract businesses from elsewhere to expand operations in the State.”

2. Implementation – Work Plan

- Timeline is clear with clear roles and responsibilities
- Nicely organized

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Steamboat Road Consulting

DATE: 7/8/24

EVALUATOR NAME: Jake Daniele

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

No cover sheet.

"a Maine-based management consulting firm with extensive experience in the aquaculture, maritime, and manufacturing sectors. Our portfolio ranges from: • Start-ups to Commercial Enterprises: From small shellfish and seaweed start-ups to commercial marine renewable power companies, we tailor our strategies to meet the unique needs of each client and achieve results. • Local to International: Our services extend from a local focus in Maine to clients across the U.S. and beyond, giving us an understanding of both regional and global blue economy dynamics."

Has a **venture arm** called Norfolk Green Ventures. 11 companies with 2 being Maine based. 5 are international.

This is unique – would give interesting perspective but venture capital is not what this RFP is about.

"Our work with organizations such as **Maine Center for Entrepreneurs**, The Nature Conservancy of Maine, Sea Ahead, The University of Maine, and the Roux Institute highlights our ability to engage effectively with a wide range of partners."

Projects show work with MCE in aquaculture with three specific companies. Already know many of the major players in the Business Ecosystem in Maine. That is a nice jumpstart.

**STATE OF MAINE
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The Nature Conservancy used for permitting process. This shows knowledge of Maine aquaculture but not economics of whole sector. Long standing relationship with Ocean Renewable Power Company (Stew is board member of MCE).

2. Subcontractors
None

3. Organizational Chart
Shows founder at top with 4 project managers at the same level. Does not show how Blue Economy project fits in. Does have short description of all five employees.

“Relevant Experience Highlights

- ✓ 50+ years of combined project management experience
- ✓ Certified Project Management professionals (PMPs)
- ✓ Experience working with government agencies and non-profits
- ✓ Experience working with start-ups:
 - o Project managing dynamic environments to hit short-term and longer-term business goals.
 - o Experience using Agile and other lean project management approaches.
- ✓ International, domestic, and local experience working within the blue economy sector”

They have the experience and expertise to do the work described in the RFP.

4. Litigation
- Indicates no currently and for last 5 years.
5. Certificate of Insurance
- Included

II. Proposed Services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

1. Services to be Provided

Has cover page – For and By

Seems assertive, calling out the RFP number and LD is being specific and shows they can be detailed – “Steamboat Road Consulting (SBRC) proposes to deliver comprehensive project management services to lead and facilitate Maine’s Blue Economy Task Force (BETF) to achieve the objectives set forth in S.P. 523 – L.D. 1286, and the State of Maine Department of Economic & Community Development Office of Business Development (OBD) RFP #202405101.”

Breaks out assignments to the team. Lydia would be project manager with Alex as assistant. The other three would be subject matter experts.

Proposing 6 categories.

Nice to see other tools specifically called out.

“SBRC expects to utilize several project management tools for effective and efficient communication, organization, and reaching consensus decisions with the BETF. Below is a list of tools that SBRC uses frequently on similar projects and will likely be used to accomplish this scope of work:

- Integrated Master Schedule (IMS) in the form of MS Project Gantt chart
- Email communications and calendar invitations
- Group messaging and chat boards
- Miro for digital whiteboarding and collaboration
- Shared file storage and collaboration services
- Surveys for up-front BETF member input
- Standard meeting agenda and minutes templates
- Strength, Weakness, Opportunities, and Threats (SWOT) analysis
- PICK charts or multi-voting for consensus decision-making
- Surveys distributed incrementally for real-time feedback and continuous improvement”

Again, very detailed and specific which is helpful for the RFP.

2. Implementation – Work Plan

Work plan is very detailed and visually appealing (though somewhat boring). Check boxes indicate who is doing what and in what months. **Shows they thought it out and have assigned**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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tasks. All 6 categories indicated earlier in their report are covered.
33 total lines of work.

**Sites developing communication plan and management plan
and clear objectives. I'd like to think objectives are already
clear.**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 07/09/2024

EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

Overview of Steamboat Road Consulting includes description of experience in aquaculture, seaweed, and marine manufacturing. This seems like relevant background in blue economy.

The overview also cites strong Maine-based relationships:

“Key Collaborations

Steamboat Road Consulting (SBRC) has strong relationships with Maine's top institutions, trade associations, and key players in the blue economy. Our work with organizations such as Maine Center for Entrepreneurs, The Nature Conservancy of Maine, Sea Ahead, The University of Maine, and the Roux Institute highlights our ability to engage effectively with a wide range of partners.

Leveraging our extensive network, industry expertise, and commitment to sustainability, SBRC is well-positioned to manage the BETF consultation process, fostering effective collaboration across all sectors of the blue economy.”

The venture arm of the company is interesting. The focus on seaweed in particular was noted. I think it would be important to ensure that this would not result in an overemphasis on seaweed if SBRC were awarded. The specific business interest seems like a potential conflict.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Victoria Foley

EVALUATOR DEPARTMENT: Maine Department of Economic & Community Development

2. Subcontractors

No subcontractors proposed.

3. Organizational Chart

Provided. Blue economy experience is evident from the team members involved in the project, including domestic and international work in the sector.

4. Litigation

None.

5. Certificate of Insurance

Provided.

II. Proposed Services

1. Services to be Provided

The proposal demonstrates a clear understanding of the timeline outlined in the RFP:

“On a short-duration project like this, it is crucial to begin early and prioritize tasks to accommodate any unforeseen challenges. SBRC is committed to abiding by the schedule in the RFP and completing many of the initial tasks within the first month.” I strongly agree with the understanding that the short duration of the project requires early prioritization.

I was pleased to see the detail in Task 2 relating to stakeholder engagement/consultation. SBRC clearly notes that consultation will be scheduled with the BETF and during BETF meetings, which aligns with the RFP. Good.

The proposal notes the resources SBRC would use if awarded, demonstrating a clear understanding of what is available to draw upon for the work.

2. Implementation – Work Plan

The work plan is thorough and indicates clear understanding of the timing of deliverables to the Legislature pursuant to statute and as outlined in the RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Economic & Community
Development

The work plan also includes notation of the team members of SBRC who would be lead and support on each task. Many of the tasks that would be completed in the first month are reasonable, rather than overoptimistic.



STATE OF MAINE
DEPARTMENT OF ECONOMIC AND
COMMUNITY DEVELOPMENT

Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202405101

RFP TITLE: Blue Economy Task Force Subject Matter Expertise and Project Management

I, Jake Daniele accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Economic and 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 *Jake Daniele*

Date 7/2/24



STATE OF MAINE
DEPARTMENT OF ECONOMIC AND
COMMUNITY DEVELOPMENT

Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202405101

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I, Victoria Foley accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Economic and 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.

Victoria Foley
Signature

7/2/24
Date



STATE OF MAINE
DEPARTMENT OF ECONOMIC &
COMMUNITY DEVELOPMENT

Janet T. Mills
Governor

Heather Johnson
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202405101

RFP TITLE: Blue Economy Task Force Project Management and Subject Matter Expertise

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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6/28/24

Signature

Date