

**State of Maine
Master Score Sheet**

RFP# 202312246					
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species					
Bidder Name:		Action Research	Behavioral Insights	Broadreach Public Relations	DJ Case & Associates
Proposed Cost:		\$80,000.00	\$80,000.00	\$80,000.00	\$79,372.00
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	30	27	21	20	15
Section III: Proposed Services	45	43	31	25	22
Section IV: Cost Proposal	25	24.6	24.6	24.6	24.7
TOTAL	<u>100</u>	<u>94.6</u>	<u>76.6</u>	<u>69.6</u>	<u>61.7</u>
Bidder Name:		Ethos	Ignite 360	MarketWise	We Us Them, Inc.
Proposed Cost:		\$79,987.78	\$131,500.00	\$78,700.00	\$80,000.00
Scoring Sections	Points Available				
Section I: Preliminary Information	Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience	30	23	19	16	10
Section III: Proposed Services	45	40	24	21	11
Section IV: Cost Proposal	25	24.6	15	25	24.6
TOTAL	<u>100</u>	<u>87.6</u>	<u>58</u>	<u>62</u>	<u>45.6</u>

Award Justification Statement
RFP# 202312246 - Social Marketing Research and Plan for
Prevention of Aquatic Invasive Species

I. Summary

The Maine Department of Environmental Protection (DEP) is seeking social marketing services grounded in Community Based Social Marketing to lead behavior prioritization and barrier/benefit research, identify strategy recommendations, and design a social marketing behavior change plan to increase awareness of aquatic invasive species (AIS) and improve compliance and/or implementation of behaviors that will reduce the spread of AIS. Maine's inland waters are integral to residents' and visitors' quality of life and to the State's economy. These waters provide habitat for aquatic plants and animals. While some of Maine's waters have been negatively impacted by AIS, Maine still has much to protect. There are currently thirty-eight Maine water bodies with a known infestation of aquatic invasive plants ([Interactive Map of Infestations](#)). The Maine DEP addresses aquatic invasive species - primarily plants - three ways: prevention, early detection, and control. Current Maine efforts to reduce the spread of AIS include [Courtesy Boat Inspections](#) (CBI), promoting "[Clean, Drain, Dry](#)", and programs for early detection and control to address infestations. These efforts depend on a partnership with various agencies (including the Maine Department of Inland Fisheries and Wildlife) and organizations throughout the state.

II. Evaluation Process

Three out of four members of the Aquatic Invasive Species Unit at the Maine DEP, as well as a former DEP staff person with social marketing and behavior change experience reviewed eight proposals submitted for this RFP. Communication via email was conducted to determine a process and timeline that fit everyone's schedules. Toni Pied (RFP Coordinator) compiled materials from each Bidder and sent the proposals, along with a template for recording individual notes on each proposal. Once all proposals were reviewed individually, the team met to discuss and score the proposals, using a team consensus approach. The team met on March 26th and March 27th for about four hours each day. During the final meeting, the team tallied up all the scores and discussed the winning bid, as well as the process to move forward with the winning bid.

III. Qualifications & Experience

- Experience working on environmental issues.
- Project Manager experienced working with environmental issues.
- CBSM experience.
- More than 20-year history in social marketing.
- Some invasives work.
- Staff with biological science backgrounds.
- Broad experience with data and messaging.

IV. Proposed Services

- Accurately described what we are looking for.
- Methodology was good.
- Planning to meet with experts outside DEP.
- Kick-off meeting with a plan to get team on the same page (understanding CMBG).
- Identify how barriers and benefits will be identified.
- Provided a list of tools.
- Gave a deliverables list.
- Will provide a marketing plan and provide DEP with a list of what will be needed.
- Will work with distinct audiences instead of a broad approach.
- Messaging will depend on species and identifying knowledge gaps.
- Workplan and timeline included.
- Will use both qualitative and quantitative methods.
- Outlined the process for detailed, structured meetings.
- Cited information about CBSM.
- Proposal summarized each section.

V. Cost Proposal

The cost proposal was based on a mathematical formula and the evaluation teams individual review did not have a consensus approach, therefore they did not have an impact on scoring.

Action Research bid = \$80,000.00

Lowest bid = \$78,700.00

Highest bid - \$131,500.00

VI. Conclusion

Action Research has extensive experience with social marketing strategies as well as behavior change methodology. They have experience with Community Based Social Marketing (CBSM) and their Project Manager has experience working on environmental issues. Their proposal was clear and provided the details necessary to understand their process for meeting the criteria and deliverables outlined in the RFP. The timeline (although adjustments will be needed pending the start of the contract) seems realistic and aligned with the tasks described in the proposal. Overall, Action Research provided a proposal that most accurately fit the services requested at this time.



**STATE OF MAINE
DEPARTMENT OF ENVIRONMENTAL
PROTECTION**



**Janet T. Mills
Governor**

**Melanie Loyzim
Commissioner**

May 8, 2024

Action Research
3630 Ocean Ranch Boulevard
Oceanside, CA 92056

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Stephen McGuire:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. 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:

- Action Research

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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,

Toni B. Pied, Maine Department of Environmental Protection, Aquatic Invasive Species Unit
toni.pied@maine.gov (207) 955-0810

STATEMENT OF APPEAL RIGHTS

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



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May 8, 2024

Behavioral Insights, Inc.
1 Dock 72 Way, 7th Floor
Brooklyn, NY 11205

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Sheena Mirpuri:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. 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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Commissioner**

May 8, 2024

Broadreach Public Relations, LLC
19 Commercial Street
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Linda Varrell:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. 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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toni.pied@maine.gov (207) 955-0810

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May 8, 2024

DJ Case & Associates
317 East Jefferson Blvd
Mishawaka, IN 46545

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Matt Harlow:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. 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,

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toni.pied@maine.gov (207) 955-0810

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May 8, 2024

Ethos
17 Ash Street
Westbrook, ME 04092

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Ted Darling:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. 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,

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toni.pied@maine.gov (207) 955-0810

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May 8, 2024

Ignite 360
40 Bronte Street
San Francisco, CA 94110

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Rob Volpe:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. 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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toni.pied@maine.gov (207) 955-0810

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May 8, 2024

MarketWise
8256 Foxberry Drive
Savage, MN 55378

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Mike Haldane:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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**Janet T. Mills
Governor**

**Melanie Loyzim
Commissioner**

May 8, 2024

WeUsThem Inc.
1791 Barrington Street, Suite 402
Halifax, Nova Scotia, Canada B3J 3K9

SUBJECT: Notice of Conditional Contract Award under RFP #202312246,
Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

Dear Taryn Crosby:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Environmental Protection for Social Marketing Research and Plan for Prevention of Aquatic Invasive Species. 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,

Toni B. Pied, Maine Department of Environmental Protection, Aquatic Invasive Species Unit
toni.pied@maine.gov (207) 955-0810

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Action Research

DATE: March 26, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	27
Section III. Proposed Services	45	43
Section IV. Cost Proposal	25	24.6
<u>Total Points</u>	<u>100</u>	<u>94.6</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Action Research

DATE: March 26, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Action Research

DATE: March 26, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	27

Evaluation Team Comments:

- Experience working on environmental issues.
- Have Project Manager experienced working with environmental issues.
- Not exactly the same issues as what our proposal focuses on, but lots of environmental experience.
- CBSM experience (working with Doug McKenzie-Mohr).
- Unclear regarding how subcontractor will be involved.
- More than 20-year history in social marketing.
- Some invasives work.
- Staff with biological science backgrounds. Broad experience with data and messaging.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Action Research

DATE: March 26, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	43

Evaluation Team Comments:

Describes methods and resources used? Describes how tasks will be accomplished? Describes how expectations and/or desired outcomes will be achieved? Implementation – Work Plan and Timeline.

- Accurately described what we were looking for.
- Used the right language.
- Methodology was good.
- Liked that they are planning to meet with experts outside DEP.
- Liked kick-off meetings and that they plan to get team on the same page (w/CMBG).
- Identify how they will ID benefits and barriers.
- Did not specify whether they would do focus groups.
- Mentioned they would put aside their speculations and rely on the data.
- List of tools was good.
- Gave a deliverables list.
- Will provide a marketing plan and provide DEP with a list of what would be needed.
- Mentioned working with distinct audiences instead of a broad approach.
- Mentioned messaging depending on species and identifying knowledge gaps.
- Included a lot of jargon without explanation of what the jargon meant.
- Wished they had been more specific about desired behavior of “Clean, Drain, Dry”.
- Had a good workplan and timeline.
- Mentioned using both qualitative and quantitative methods.
- Good mention of detailed structured meetings.
- Cite information about CBSM.
- Liked how they described the process.
- Appears all work is virtual.
- Wondered about focus groups?
- Mentioned more about subcontractor (Ty Webb).
- Liked how proposal summarized each section.
- Some of their description of how they will implement the work was unclear.
- Timeline will need to be adjusted based on when contract is awarded.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Action Research

DATE: March 26, 2024

**• EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700	,	\$80,000	x	25 points	=	24.6

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Behavioral Insights

DATE: March 26, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
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<u>Total Points</u>	<u>100</u>	<u>76.6</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Behavioral Insights

DATE: March 26, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Behavioral Insights

DATE: March 26, 2024

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

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

Evaluation Team Comments:

- Been in business since 2010, strong international presence, has worked in Maine.
- Focus on products.
- No experience with AIS.
- Co-author on CMBG and conservation.
- Staff experience was not fully outlined.
- Good description of subcontractor, but not sure who is doing which part of the project.
- Did mention “nudge”, which is an acronym based on a type of social marketing tool.
- Website information did not seem to match what they said they would do.
- They work mostly with corporate accounts.
- They do work with The Nature Conservancy, but mostly on donor outreach.
- Seems like they are geared more toward business efficiency.
- Had a recent project in nearby NH.
- Has worked with multiple state agencies.
- Say they have over 100 projects related to environmental issues, but only two of the three projects they gave are related to the environment.
- Subcontractor, Blaze Partners: Founded Maine Outdoor Brands; B Corp status; approved vendor for MDIFW; worked with Governor’s Office of Policy, Innovation & the Future; the Governor’s Energy Office (Climate Action Plan); and others; Will be responsible for Phase II Deliverables; Staff experience described.
- No description for staff at BIT.
- Experience working on environmental issues.
- Have Project Manager experienced working with environmental issues.
- Not exactly the same issues as what our proposal focuses on, but lots of environmental experience.
- CBSM experience (working with Doug McKenzie-Mohr).
- Unclear regarding how subcontractor will be involved.
- More than 20-year history in social marketing.
- Some invasives work.
- Staff with biological science backgrounds.
- Broad experience with data and messaging.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Behavioral Insights

DATE: March 26, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	31

Evaluation Team Comments:

*Describes methods and resources used? Describes how tasks will be accomplished?
Describes how expectations and/or desired outcomes will be achieved? Implementation –
Work Plan and Timeline.*

- Outlined principles of CMBG.
- Included focus groups and identification of benefits and barriers.
- Discuss using previous outreach and data from DEP to identify successes and failures.
- Seemed to have information about the courtesy boat inspection program.
- Outlined and identified the role of DEP and the subcontractor, but not exactly the role of BIT.
- Workplan and timeline was clearly defined.
- Tools identified for doing the work.
- Blaze is limited to creating 1-3 marketing materials, which seems like a small number.
- Kick-off meeting is a plus, non-devisable behavior is good.
- Made it clear how DEP would be involved.
- “Messaging is a tool to achieve a larger outcome.” – wondering if they are putting too much emphasis on the message rather than the behavior.
- Their research tools did not seem clear.
- Liked how they talked about meeting facilitator and note-taker (good detail there).
- Liked IFM matrix.
- Workplan and timeline seemed more clear than the written description of the work to be done.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Behavioral Insights

DATE: March 26, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700	,	\$80,000	x	25 points	=	24.6

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Broadreach Public Relations

DATE: March 26, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	20
Section III. Proposed Services	45	25
Section IV. Cost Proposal	25	24.6
<u>Total Points</u>	<u>100</u>	<u>69.6</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Broadreach Public Relations

DATE: March 26, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Broadreach Public Relations

DATE: March 26, 2024

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

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

Evaluation Team Comments:

- History of working with Maine State Agencies.
- They serve ME, MA, NH.
- They noted the work is nuanced (which is true).
- Market Decisions is a subcontractor which has a history with MDEP, MDIFW.
- iBec (subcontractor) has worked with Sebago Clean Waters.
- Does some pro-bono work.
- Gave multiple examples of how their experience aligns with our project needs.
- Lists staff skills.
- Lists CBSM, but late in this section.
- Broadreach didn't seem to indicate they understand this is a behavior change project.
- Their focus doesn't seem to be what our focus is. Seems more like a public relations and marketing service.
- Market Decisions has the most detailed information.
- iBec is an expert in web design, but we may not need that service.
- The project examples are not the examples we were asking for (awareness vs behavior change).
- Details in previous projects are mostly related to marketing.
- Who does what is a little confusing in this section.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Broadreach Public Relations

DATE: March 26, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	25

Evaluation Team Comments:

*Describes methods and resources used? Describes how tasks will be accomplished?
Describes how expectations and/or desired outcomes will be achieved? Implementation –
Work Plan and Timeline.*

- Scope of work and project development was missing.
- Messaging development was missing.
- No details of marketing plan.
- Deliverables from Market Decisions, but not Broadreach. Quantitative and qualitative work.
- No mention of literature search or learning from MDEP.
- Started with a focus group rather than talking with DEP or partners.
- Primary goals include awareness, but did not mention behavior until later. Felt it was not clear how they would achieve the goal.
- Talk about an initial meeting with DEP to develop survey.
- Their scope seems to go beyond what our focus is.
- Examples given do not seem to align with current behavior change methodology.
- Timeline is included, but will need to be adjusted.
- Still not clear on who is doing what on this project.
- This proposal seems to focus on the creation and delivery of a campaign rather than just the research and suggested methods for outreach.
- The firm brings many attractive features, but doesn't seem to meet our challenges and needs.
- Not much discussion of the role of CBSM.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Broadreach Public Relations

DATE: March 26, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700	,	\$80,000	x	25 points	=	24.6

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: DJ Case & Associates

DATE: March 26, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15
Section III. Proposed Services	45	22
Section IV. Cost Proposal	25	24.7
<u>Total Points</u>	<u>100</u>	<u>61.7</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: DJ Case & Associates

DATE: March 26, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: DJ Case & Associates

DATE: March 26, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	15

Evaluation Team Comments:

- Specialize in conservation and natural resources communications (but not necessarily behavior change).
- Website has a lot of examples.
- No subcontractors.
- Started in human dimensions and wildlife.
- Liked that they asked the question, what do we hope to achieve and what do we want people to do?
- Application was minimal, but website had a lot of good information.
- Did not specifically mention CBSM, but has experience working with wildlife organizations.
- Some links in proposal did not work.
- Information is minimal.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: DJ Case & Associates

DATE: March 26, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	22

Evaluation Team Comments:

*Describes methods and resources used? Describes how tasks will be accomplished?
Describes how expectations and/or desired outcomes will be achieved? Implementation –
Work Plan and Timeline.*

- Liked the plan for a kick-off meeting.
- Recognized we can't regulate the solution to prevention behavior.
- Talk to CBIs in a focus group.
- Focus heavily on boaters and do not mention other groups.
- Staff will be coaching DEP to implement campaign.
- Not enough information or deliverables.
- Did not see mention of leaving DEP with a Marketing Plan.
- Regular check-ins are good.
- Good summary statement about voluntary compliance.
- No page numbers.
- Bulleted summary of what is currently working and what is not.
- Propose some time to do literature review, but don't specify how much time.
- They mention a post-survey to determine how messaging is working.
- Limiting focus group to boaters and CBIs.
- All virtual focus groups?

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: DJ Case & Associates

DATE: March 26, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700	,	\$79,372	x	25 points	=	24.7

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ethos

DATE: March 27, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	23
Section III. Proposed Services	45	40
Section IV. Cost Proposal	25	24.6
<u>Total Points</u>	<u>100</u>	<u>87.6</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ethos

DATE: March 27, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ethos

DATE: March 27, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	23

Evaluation Team Comments:

- Significant work in Maine with state agencies and NGOs.
- Little environmental experience.
- Summarize CBSM.
- They do mention barriers and benefits.
- They believe they are a “good” fit, not a “great” fit for this project.
- Decades of experience building brands and providing marketing, but not sure about behavior change work.
- Mention subcontractors and provide information.
- A large staff.
- Not a lot on behavior change, but they do mention it.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ethos

DATE: March 27, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	40

Evaluation Team Comments:

*Describes methods and resources used? Describes how tasks will be accomplished?
Describes how expectations and/or desired outcomes will be achieved? Implementation –
Work Plan and Timeline.*

- Starts with DEP stakeholder meeting and meeting with CBIs.
- Methods clearly laid out.
- Have done some research of what worked on this type of project out west.
- Timeline is clearly laid out but finishes the project within a year and not sure that is enough time.
- Focus group with two interventions.
- Good list on page three.
- Plan to “refresh” currently used materials.
- In-person focus groups at two locations.
- Good proposal.
- They talk about breaking down behaviors and have both qualitative and quantitative approaches.
- The state has limitations on creative, so not sure their creative approach would fit our needs.
- Everything was laid out clearly and the information was well organized.
- Mentions non-divisible behaviors, barriers and benefits to desired behaviors, looking into previous DEP strategies and existing resources, trusted messengers, opportunities, message testing.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ethos

DATE: March 27, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700.00	,	\$79,987.78	x	25 points	=	24.6

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ignite 360

DATE: March 27, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	19
Section III. Proposed Services	45	24
Section IV. Cost Proposal	25	15
<u>Total Points</u>	<u>100</u>	<u>58</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ignite 360

DATE: March 27, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ignite 360

DATE: March 27, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	19

Evaluation Team Comments:

- Ten years of marketing experience.
- “The human-centered design” was mentioned, but not sure exactly what that means (we had to look it up).
- Have subcontractors with about 20 years of experience.
- Mention a pilot, but not sure what type of pilot it would be?
- Environmental experience is limited, mostly with large corporations.
- Empathy approach.
- Briefly describes role of staff and contractor.
- Limited environmental experience, but significant staff experience.
- No mention of government work or environmental work.
- The subcontractor has environmental work.
- Division of labor seemed logical.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ignite 360

DATE: March 27, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	24

Evaluation Team Comments:

*Describes methods and resources used? Describes how tasks will be accomplished?
Describes how expectations and/or desired outcomes will be achieved? Implementation –
Work Plan and Timeline.*

- Describe some methods and resources to accomplish the task, but it doesn't seem to quite fit with what we are looking for.
- They mention focus groups in the Portland area, but are limited in the number of interviews they would do.
- Their interview list did not mention lake residents.
- Discussed a video meeting with DEP.
- Focus on empathy as a means to change behavior.
- Mention talking with residents and non-residents of Maine.
- Some detail in workplan, but no mention of specific tools and results.
- Rewind to get up-to-speed and meeting with DEP.
- Mention non-divisible behaviors and barriers.
- The flow of the workplan doesn't seem to connect with what was described previously.
- Liked that they are planning to talk with people from out-of-state as well as in-state. They mention that information is not enough to change behavior.
- Timeline made sense, but it was full of abbreviations with no key (concerned this might reflect the type of work they submit).

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: Ignite 360

DATE: March 27, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700	,	\$131,500.00	x	25 points	=	15

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: MarketWise

DATE: March 27, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	16
Section III. Proposed Services	45	21
Section IV. Cost Proposal	25	25
<u>Total Points</u>	<u>100</u>	<u>62</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: MarketWise

DATE: March 27, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: MarketWise

DATE: March 27, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	16

Evaluation Team Comments:

- They serve Fortune 500 clients.
- They will use subcontractors.
- Extensive background, but mostly in tech products and the service industry.
- Corporate/Commercial experience and their work with the irrigation project is traditional marketing.
- No social marketing experience.
- Subcontractors are also more traditional marketing.
- Small organization, but staff is experienced.
- No environmental experience.
- No government experience.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: MarketWise

DATE: March 27, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	21

Evaluation Team Comments:

*Describes methods and resources used? Describes how tasks will be accomplished?
Describes how expectations and/or desired outcomes will be achieved? Implementation –
Work Plan and Timeline.*

- Mention they will use CBSM approach.
- Traveling with Wardens is not a priority.
- Focus groups based on user groups.
- Brief statement about each task to be addressed.
- A very cursory proposal.
- No mention of a kick-off meeting or tapping DEP to get started.
- Feels less like a partnership and more like they are just going to do the work and give us a final product.
- They talked about doing observations.
- Timeline looks ok, but doesn't include DEP in list of activities.
- There is very little detail about how they will work with DEP and stakeholders.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: MarketWise

DATE: March 27, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700	,	\$78,700.00	x	25 points	=	25

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: We Us Them, Inc.

DATE: March 27, 2024

SUMMARY PAGE

Department Name: Department of Environmental Protection

Name of RFP Coordinator: Toni Pied

Names of Evaluators: John McPhedran, Denise Blanchette, Kathy Hoppe

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	X	
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	10
Section III. Proposed Services	45	11
Section IV. Cost Proposal	25	24.6
<u>Total Points</u>	<u>100</u>	<u>45.6</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: We Us Them, Inc.

DATE: March 27, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments: N/A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: We Us Them, Inc.

DATE: March 27, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	30	10

Evaluation Team Comments:

- Ten years of experience.
- A brief outline provided little insight into what they have done.
- Seem more like a traditional marketing agency.
- No environmental work.
- Important projects are summarized, but they are not relatable to our project.
- No subcontractors.
- Does not appear to have experience with environmental issues.
- Discusses marketing approach, but not CBSM.
- Raise awareness, but do not mention behavior change methods.
- Their focus and strengths are not what we are looking for.
- No detail in organizational chart.
- Proposal seemed somewhat generic and hastily put together.
- The presentation of documents was clunky with some pages in landscape and some in portrait.
- DEI Competence – lists several policies related to diversity, equity, inclusion.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: We Us Them, Inc.

DATE: March 27, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	45	11

Evaluation Team Comments:

*Describes methods and resources used? Describes how tasks will be accomplished?
Describes how expectations and/or desired outcomes will be achieved? Implementation –
Work Plan and Timeline.*

- Focus groups, online surveys, conduct a literature review.
- The narrative summary of their approach here seems complete.
- The implementation and timeline does not flow well and may not fit with our needs.
- Format is distracting and there is little detail about how tasks will be accomplished.
- Some verbiage used was unclear (lingo).
- Entirety of proposal is generic and does not seem to be tailored to what we are looking for.
- Discuss many tools, but does not describe how they will be used.
- Used terminology we do not know and did not explain.
- Felt like they used a generic approach.
- Their timeline shows the project being completed in seven months, which is likely not enough time to complete all the tasks we have requested.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER: We Us Them, Inc.

DATE: March 27, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$78,700	,	\$80,000.00	x	25 points	=	24.6

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Action Research

DATE: 3/6/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview - More than 20 year history in Social Marketing Experience, Nationwide experience. Some experience in Southeastern US. And western Ma on Invasive Species issues
2. Subcontractors- Ty Webb design
3. Organizational Chart
4. Environmental Experience- Has worked on a variety of Environmental issues
5. Staff experience – Staff has background in biological sciences and experience working on environmental issues. Broad range of experience with data, research and messaging.

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

Describe methods that they will use to get to a desired goal CDD, beginning broad and narrowing down. Detailed description of structure of meetings and coordination of partners and players in understanding the process of CBSM

Look to message differently to different audiences and species, identify knowledge gaps and behavior that could be beneficial to achieve goals. Distinct Audiences

Broad discussion about individual species as targets for behavior change vs looking at the behavior desired CDD for all species establishing this behavior as the norm.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Action Research

DATE: 3/6/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Will use qualitative research to develop direction Focus Groups, and interviews literature review. Web survey links (1000) individuals, seems limited for a survey. Outlines the steps and strategies for Social Marketing and lists displays and tables as a deliverable for the process.

Implementation- Work Plan and Timeline

Provide a detailed inclusive timeline for activities outlined in the proposal. They include who will implement the actions. These include qualitative and quantitative actions resulting in a pilot design and materials to conduct outreach activities.

Section IV Coast Proposal \$80,000 includes mostly staff (\$72,000)- 1000 materials and "other" \$7000 for personnel not detailed also list personnel in first section.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Action Research

DATE: 3/10/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview (+) staff experience in CBSM including work on environmental issues in MN (mussels) and Western MA. Project manager with experience in Wisconsin lake issues.
2. Subcontractors (?) is TY Web Design a contractor; unclear.
3. Organizational Chart: I gather just the green boxes are staff who would work on our project.
4. Environmental Experience +in addition to above project, also project to protect Chesapeake see grass; also runoff in Orange Co Cal.
5. Staff experience +appears to have considerable experience in environmental issues not exactly the same as but similar to DEP's need.

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) cites relevant research and CBSM including by firm President

(+) need to narrow the list of behaviors, eventually having tier 1 and tier 2 behaviors. Virtual initial meeting.

(+) gratis briefing webinar for partners and stakeholders – sounds good.

Appears that all work is virtual (not surprising)

(q) research and mining staff for info but what about focus groups?

Will survey AIS specialists recommended by DEP

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

? “behaviors that move forward will be within one or two audiences...” what does this mean?

+outlines potential research, specific approach to be determined based on previous steps in the process. Notes examples of audience for potential interviews.

+notes quantitative research approach too.

Up to 6 progress meetings for deliverables

Implementation- Work Plan and Timeline

(+)testing strategies

? Ty Webb is contractor? Action provides the content

(+) I like how the proposal summarizes each section and follows that with details to reinforce and expand

(q) example of output is number of boats drained and dried, not number of website hits.

How will we get at that metric without cameras or other reconnaissance?

(+) meet up to twice to review marketing and implementation

+detailed timeline from 3/24-3/26

Section IV Cost Proposal

Total staffing hours 4.5/week.

Total cost \$80K of which \$7K is sub-contractor

+ no indirect charges

Overall: impressive proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Action Research

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

1. Overview
2. Subcontractors
3. Organizational Chart
4. Environmental Experience
5. Staff experience

- + Behavioral Change firm – CBSM is their thing (from website “Action Research specializes in changing behavior for the public good by applying marketing and social science research to outreach programs that promote clean, healthy, and sustainable communities”)
- + working with Doug McKenzie-Mohr
- + 20 year history
- + environmental/science work (Wild Scenic River, Chesapeake Bay, MN Zoo). From website – environment is their thing. stormwater, recycling, trash
- + invasive species experience
- + they have working with public sector experience – lots including Mass DEP.
- +/-- Unclear in quals section & org chart where TY Webb Design comes in but on p6 see “Ty Webb Design to develop specific outreach materials”
- + TY Web – lots of environmental campaigns.
- + org chart clear
- + Staff experience since agency is totally focused on environmental issues and they are focused on behavior change, ALL staff have experience in what we are looking for.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Action Research

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

+ mention which staff will be doing which steps/involved.

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

+ accurately describes what we are looking for – the steps – speaks the right language.

+ Methodology is spot on. Meet with DEP, Lit review, talk to experts

+ Will talk to 10 experts p3

+ good descriptor of kick off meeting

+++++++ for the 90-minute intro to CBSM

+ provided numbers e.g. # of working sessions.

+ p3 Probability, application & impact – they get it, ID benefits & barriers

? p4 didn't specify focus group, interview etc. waiting to see what falls out from earlier research.

+ p4 – 'put aside personal speculation'

+/- at first wondered about virtual focus groups – missing body language but most are proposing virtual. Also wonder if this is a bias as those who participate need to be familiar with computers, and of course own one. I don't know current demographics.

+ p5 list of tools – good.

? p 2 virtual kickoff but p6 – 'in-person kick-off meeting' ?

+ deliverables from phase I (p6) Looks like they will set DEP/AIS program

+/- pre-piolet message testing (p6) with focus groups or intercept interviews (how will they do intercept interviews if they are in CA?) – oh see on p7 DEP will assist in pre-test

+ will provide marketing plan

+ believe when project is finished DEP will have a path forward if money and staff are there to implement.

+ Well written, easy to follow, an example of their future product

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Action Research

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

- ✓ Kick off meeting (plus 90 minute intro)
- ✓ Interview/recognize other experts or stakeholders
- ✓ Lit review
- ✓ Focus groups (list options focus group, interviews)
- ✓ Survey
- ✓ Develop materials
- ✓ Test
- ✓ Marketing Plan

Implementation- Work Plan and Timeline

+ 2 years to complete Spring 2024-spring 2026 – seems likely and reasonable.

+ not overly ambitious – can likely meet staff timeline and government schedules - LOL

Section IV Coast Proposal (25 points)

\$80k

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Action Research

DATE: March 8, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview

- Behavior-change marketing firm from Oceanside, CA
- Founded in 2001
- Specializes in the application of behavioral social science research to outreach programs that promote safe, healthy, and sustainable communities.

2. Subcontractors

- Ty Webb Design: Branding agency?

3. Organizational Chart (provided)

4. Environmental Experience

- Minnesota Zoo: Action Research currently works with the Minnesota Zoo to foster conservation behaviors toward native mussel populations. Following the CBSM framework, we conducted a literature review, in-depth interviews, and a statewide survey to identify target audiences and behaviors as well as their barriers and benefits. Results informed an outreach campaign leveraging public commitments, social norms, and prompts encouraging residents to pick up dog waste before rain events. Piloting is underway and preliminary results have refined the strategies to enhance effectiveness.
- Chesapeake Bay Program: Action Research worked with the Chesapeake Bay Program from 2019 to 2021 to develop behavior change strategies to protect underwater grasses and promote natural shorelines. Using the CBSM framework, we conducted survey and focus group research with property owners to inform strategies, messaging, and communication channels that remove barriers and enhance motivation. These efforts

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

resulted in an outreach toolkit including creative materials, communication scripts, and implementation instructions. Strategies leveraged behavior change tools including prompts, commitments, social diffusion, and social norms.

- Orange County Stormwater Program: Action Research has worked with the Orange County Stormwater Program (H2OC) since 2018 to develop award winning outreach programs grounded in CBSM. These programs have addressed a diverse set of behaviors and target audiences including irrigation runoff elimination (property owners), litter prevention (youth), and alternatives to pesticide use (residents). Developing programs based on sound audience research and appropriately leveraging behavior change tools, these programs have resulted in quantitative reductions in pollution and established H2OC as a leader in the stormwater management field.
5. Staff experience
- **The project will be managed by Andrew McGuire, PhD.** Dr. McGuire has had **five years of experience developing and managing CBSM projects focused on behaviors impacting water quality, invasive species, and food waste.**

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) Describes methods, resources, and how outcomes will be achieved.

(+) Provides information on subcontractor

- Behavior Selection Deliverables: In-person kick-off meeting; virtual working sessions to discuss sectors, audiences, and behaviors. Up to six progress meetings. A comprehensive list of behaviors including their associated target audience; rating of potential prevention of AIS spread; probability; penetration; applicability; and final weights. A list of Tier 1 and Tier 2 behaviors. A summary memo detailing outcomes and next steps for barrier and benefit research, sector identification and behavior prioritization research methodology, and copies of all research tools utilized (e.g., survey).
- Barrier/Benefit Research Deliverables: Up to six progress meetings. Summary report with key outcomes, analysis describing how the results support the target behaviors and audience(s) and proposed next steps for

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EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

strategy development. Copies of all research tools utilized and a summary of data collection methodology. A final report including strategy tables for each target audience with research-based recommendations for promoting behaviors within the next step in the CBSM process. A conference call to review the results and recommendations.

- Table and Design Deliverables: Memo detailing selected strategies.
- Strategy Recommendations and Design Deliverables: Up to six progress meetings. A creative brief outlining potential outreach campaigns based on selected strategies. Copies of all graphics, print materials, electronic media, and promotional items developed for the project. A summary memo of focus group, stakeholder, or pre-pilot testing of proposed behavior change strategies including the resultant strategy refinements, as appropriate. A marketing and implementation plan for one or more strategies that outlines key messages, materials, channels, and messengers for each strategy to be pilot tested. It will also provide all appropriate metrics for evaluation. A final conference call to review the marketing and implementation plan and address any lingering questions.
 - o **(Subcontractor)** Work with Ty Webb Design on outreach/branded materials (two potential campaign themes/strategy)

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract.

Section IV Cost Proposal

(+) Cost Proposal provided = \$80,000

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Behavior Insights

DATE: 3/6/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview - The organization has been in business since 2010, began internationally and continues to have an international presence.
2. Subcontractors Blaze. Marketing Research group. Has worked on several projects in Maine.
3. Organizational Chart Provided. Small staff outlined on chart.
4. Environmental Experience Most environmental experience is passive. Based on consumption of environmental products or economic issues. No experience with behaviors as they relate to AIS. Has published work with co-author on using CBSM in conservation.
5. Staff experience Not clearly or outlined in any detail. More detail on the Blaze staff.

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

Outlines the principles of the CBSM approach, that includes focus groups and identification of benefits and barriers. Discuss using previous outreach efforts, data, success, failures to inform the future work. Mentions on site observations of CBI's.in addition to focus groups and data searches. Clearly outlines and defines the role of DEP BIT and the subcontractor. Realistic approach and expectations

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Behavior Insights

DATE: 3/6/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

Clearly defined work plan and timeline. Outline who will be responsible for each tasks and what tools will result from the work done.

Section IV Cost Proposal \$80,000

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Behavioral Insights

DATE: 3/11/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
NYC based
(i) - first established by UK Government
Recent project in NH re vax rates
2. Subcontractors
(+) Yarmouth, ME based sub called Blaze Partners
Under Subcontractors, states that BIT will sub to blaze to provide the services requested in the RFP – ALL services??
(+) Blaze has worked with multiple Maine state agencies
3. Organizational Chart
4. Environmental Experience
(+) over 100 projects related to environmental issues
(+) details description of 3 projects, only remotely related to our needs
5. Staff experience

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(-) Don't need to include in proposal information on AIS – we know that.
(?) COM-B and EAST: short on details of these approaches. Would prefer to see background/science of these.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Behavioral Insights

DATE: 3/11/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

(?) I don't think they explain a non-divisible behavior

(+) will research, facilitate focus groups including towns and marinas. Facilitator and note taker

(-) tasks explained OK but the approach doesn't appear to be complete with background information

(+) on-site interviews and observations – Good to be in person for some of this.

(-) we ALREADY know that rec lake users are key audience. This should be reflected in task 1D.

(+) IFM matrix (Task 1F)

(-) ToC is more lingo which I think distracts from the proposal but good explanation how it could be used.

Implementation- Work Plan and Timeline

(+) Phase 2 on page 6 seems more cogent and concise than previous portion of proposal.

The QA statement (p. 8) is good but seems out of place – would have fit better at the top of the RFP (IMO)

Time line is adequate

Section IV Cost Proposal

Total \$80K with 42/38 phase ½

- indirect costs included

-\$10,900 is for subcontractor

Overall: proposal does not flow well.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Behavioral Insights, Inc

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

1. Overview
2. Subcontractors
3. Organizational Chart
4. Environmental Experience
5. Staff experience

+ Nudge history

+ history of behaviors linked to environmental stewardship

+/- Subcontract with Blaze Partners an advertising & digital marketing agency in Yarmouth

+ environmental experience, world wide, no AIS, passive

+ evaluation of campaign impact

- from their website "We offer a selection of behavioural science consultancy and services to help clients across multiple sectors to gain an understanding of their audience and create strategies that will help them to scale their business effectively." We are asking for behavior change not to scale our 'business effectively' may not be a good fit ?

- what we do from website "better decisions geared towards increased employee productivity and improved public policies that can boost their business." Not what we are asking, is this a stretch for them?

+ Maine based partner with Blaze

- Blaze works mostly with corporate accounts. Does have TNC but for major donors not behavior change. Website doesn't show IFW or any .gov work but they state it in app.

**STATE OF MAINE
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BIDDER NAME: Behavioral Insights, Inc

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

- “for us, messaging is a tool to achieve larger outcome “ too much focus on messaging
- + kick off meeting
- + a few interviews with staff and other experts
- + ID non-divisible behaviors
- + focus groups (doesn’t say if online or in person)
- + p3 methods & activities are good.
- + onsite observations and interviews
- + feasibility matrix
- + p5 all logical
- + table laying out activity and process easy to follow, might be good indicator that their products will be usable by DEP
- limit Blaze to creating 1-3 marketing materials, seems ‘stingy’ or not effective for pre-pilot p6
- +/- pretesting by focus group or field pilots
- + Clearly state client involvement
- + built in clearly stated communication with DEP

- ✓ Kick off meeting
- ✓ Interview/recognize other experts or stakeholders
- ✓ Lit review
- ✓ Focus groups (plus onsite observations)
- Survey
- ✓ Develop materials(1-3)
- ✓ Test
- ✓ Marketing Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Behavioral Insights, Inc

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EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

+/- interesting comment p10 “anticipate spending 3-4 months of concentrated work time completing all activities ..” but then recognize DEP time table

Section IV Coast Proposal (25 points)

\$80k

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Behavioral Insights (US) Inc.

DATE: March 8, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
 - Brooklyn, NY
 - Apply community-based social and behavioral science to improve policy and public services.
 - Founded in 2010 by UK Government.
2. Subcontractors
 - Blaze Partners, an ad/digital marketing agency in Yarmouth, Maine.
3. Organizational Chart (provided) (+)
4. Environmental Experience
 - Keep Indianapolis Beautiful: Litter reduction campaign; awareness and targeted interventions.
 - Wildlife Conservation Society - China: Disruption of the illegal wildlife trade (elephants, tigers and turtles) in the Greater Mekong Region, Malaysia and China.
 - **(Non-Environmental Project) Amtrak Downeaster (this was a Blaze project)**: Build up ridership.
5. Staff experience

(+) Subcontractor, Blaze Partners: Founded Maine Outdoor Brands; B Corp status; approved vendor for MDIFW; worked with Governor's Office of Policy, Innovation & the Future; the Governor's Energy Office (Climate Action Plan); and others; Will be responsible for Phase II Deliverables; **Staff experience described.**

(-) No description for staff at BIT

**STATE OF MAINE
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DATE: March 8, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) Describes methods, resources, and how outcomes will be achieved.

- Deliverables for Selecting Behaviors: Deliverables for Selecting Behaviors: Description of the methods used to identify key sectors and prioritize behaviors; Copy of research tools (focus group qualitative protocol and facilitator guide, behavioral map updated with Task 1B and 1C insights).
- Deliverables for Barrier & Benefit Research: Summary of key outcomes related to behavior prioritization; Copy of research tools (observation guide, COM-B draft, IFM); Summary of key outcomes related to behavior prioritization; Description of the methods used to determine barriers/benefits to engaging in prioritized behaviors.
- Deliverables for Strategy Development: Strategy table for each target audience; Summary of key outcomes related to barriers and benefits and proposed next steps.

(+) Provides information on subcontractor (Blaze)

- Deliverables for Implementation and Evaluation Plan: Marketing plan that clearly describes the key messages, materials, channels, and messengers for each strategy to be pilot tested; Copies of all materials [drafts] including any graphics, print materials, electronic media, promotional items, etc.; Description of the available metrics for evaluating the impact of the identified strategies.

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract; includes the ability to be flexible with timeline.

Section IV Cost Proposal

(+) Cost Proposal provided = \$80,000

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Broadreach Public Relations

DATE: 3/6/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview Maine based founded in 2007. Noticed work is nuances ME based focus groups. more marketing
2. Subcontractors Use Maine based market media (Market Decisions) for outreach materials. IBEC web design
3. Organizational Chart Provide a detailed clear organizational chart.
4. Environmental Experience Worked with MDIFW on users awareness and information for strategic plan. Sebago Clean waters MDMR
5. Staff experience Staff has extensive marketing experience in Maine working with a variety of governmental organizations on a variety of projects. Detailed descriptions of previous projects

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

Clearly outline approach and how this will reach the goals of the behavior outcome. Quantitative goals and results. Discuss using previous outreach as a tool to inform the current work. Use CBI surveys and interviews. Look to use focus groups and surveys to accumulate data to determine barriers and message. Include evaluation tools in discussion. Goals awareness .

**STATE OF MAINE
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DATE: 3/6/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline Clearly defined timeline that accommodates flexibility. Describes initial actions and launch and a refinement within the timeline of the contracts. Mostly contracts. Completing the pilot before the end of the contract and having recommendations for sustainability.

Section IV Cost Proposal \$80,000

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Broadreach Public Relations

DATE: 3/11/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
history of working with Maine State agencies
Serves ME, MA, NH
Notes that the work is nuanced
2. Subcontractors
Market Decisions, iBec and Kim Laramy
Market Decisions worked on DIFW wildlife plan and focus groups for DIFW law book.
iBec Creative worked on project for Sebago Clean Waters
3. Organizational Chart
4. Environmental Experience
Work on DIFW projects and with PWD
(-) on page 9 of proposal (app C) see ref to leveraging media opps: social media, yes, but what about CBSM?
5. Staff experience
apparently small, creative firm
this portion of the proposal uses multiple examples of work they've done to show how it aligns with our project needs.
(+) 50 years exp; single point of contact
list of concise skills
MDR has lots of exp
focus groups and other research
FINALLY: on page 13, contractor with CBSM is described.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Broadreach Public Relations

DATE: 3/11/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

Lists goals and objectives for increasing awareness and improving compliance
Surveys to identify barriers; define competition for desired behavior
Notes strategies to affect behavior change including waterfowl hunters and need to monitor efficacy

Focus group scope of work: MDR doing focus group work.

-Focus groups to ID barriers; followup survey with 400-600 respondents; final set of focus groups.

-Details process for recruiting for virtual group meetings. Ally Tippery (MDR) is trained focus group moderator.

Not clear which sub does which portion of the work

Describes survey scope of work in detail

Overall project and marketing plan is described but doesn't appear tailored to our project. Doesn't specifically reference CBSM nor does it explicitly state who (subs and personnel) work on each part of the project.

Implementation- Work Plan and Timeline

Timeline and workplan is sufficient

Section IV Cost Proposal

\$80K with breakdown of hours

6 hours/wk

\$58K to subcontractor

Overall comments

This firm brings many attractive features but in the end falls short for our needs. Proposal is very accessible and relatable but addresses what the firm has done and how they operate more than how they would address DEP's challenge. In particular, there's little detail in the process nor discussion of the role of CBSM in their proposed process with DEP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Broadreach Public Relations

DATE: March 21-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

1. Overview
2. Subcontractors
3. Organizational Chart
4. Environmental Experience
5. Staff experience

+ past working with government experience

+ here in Maine

- not looking to grow our 'reputational capital'

- public relations and marketing services (repetitive on the public relations)

+ Market Decisions partner in project. MD has past DEP & environmental experience

? working with 30r 4 companies? with iBec creative, Kim Laramy, MD & Broadreach ?

- iBec work increasing website traffic, visibility,, fundraising, website design,

- didn't see any examples of behavior change campaign.

- reads very traditional/old school Broaddreach.

- examples of projects aren't really the kind of work we are asking for (campaign piece – applying the market research). Awareness & education vs behavior change – barrier and incentive ID

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

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EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

- a little uncomfortable with the focus on raising awareness but that is the first step. Next they say compliance with CDD which technically is what we are going for, but it doesn't sound very CBSM
- + like that they set clear measurable goals but they don't even know the starting point.
- + recognize competition for the desired behavior
- + what's in it for me
- + make it personal/emotional/long term – good but standard.
- ? already leaning into collective responsibly – do we know that is a motivator ? isn't that why we do the research?
- feels 'same ole' Tips, slogans ... rather than focusing on barriers or incentives. Again doesn't sound like CBSM maybe it is?
- starts with focus group rather than with DEP/expert meeting, partner meeting
- don't see mention of lit search
- + Initial meeting good set of goals
- + focus groups and survey (quant and qual)
- No mention of barrier ID
- Scope of work for messaging, product development missing?
- Great detail on research but nothing on product or messaging development, who will do it, how it will be done, what it might involve, how it would be piloted. Almost like Broadreach dropped ball but MRD provided all the detail work for their piece???
- Don't see outcome of a marketing plan ?
- Deliverables from MRD but not from Broadreach (e.g. no print ready mock ups, web design ...)
- -lack of detail or clear path other than MD's work.

✓ Kick off meeting

✓ Interview/recognize other experts or stakeholders

Lit review

✓ Focus groups

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: March 21-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

- ✓ Survey
- ✓ Develop materials (unclear p 6 initiate development of multimedia content in time line but no details in rest of document)
- ✓ Test (appears in timeline that might 2 do phases)
Marketing Plan

Implementation- Work Plan and Timeline

+/- doesn't feel like they are proposing to do what we are asking – maybe more or less hard to say.

- feels like missing pieces – no meet attached to Broadreach process

Section IV Coast Proposal (25 points)

\$80K

+ Provided extra detail

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Broadreach Public Relations, LLC

DATE: March 8, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
 - Portland, ME
 - Specializes in strategic and crisis communications, public relations, marketing, event services and government relations.
 - Founded in 2007.
 2. Subcontractors
 - Market Decisions (research firm)
 - iBec Creative (digital marketing firm)
 3. Organizational Chart (provided) (+)
 4. Environmental Experience
 - Gulf of Maine Research Institute (Broadreach); NOAA, Water Equity Taskforce in Virginia, St. John Valley Soil & Water Conservation District, MDIFW (Market Decisions); Sebago Clean Waters, Efficiency Maine, Portland Water District (iBec Creative).
 - **Non-Environmental Experience:** Maine Brewers Guild, Jasper Wyman's Blueberries (Broadreach); Healthy Maine Partnership, NextGen 529, FAME, Snap-Ed (Kim Laramy, Contractor for Broadreach).
 5. Staff experience
- (+) Broadreach & Subcontractors (see experience above & Section II Part 2)**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Broadreach Public Relations, LLC

DATE: March 8, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) Describes methods, resources, and how outcomes will be achieved. (Surveys & Focus Groups)

- Deliverables

- Focus group deliverables include: Final moderator's guide and screener; Audio/video recordings of groups; Written and redacted transcriptions of groups; Detailed research report with executive summary. Phase two focus group report will include a summary of stakeholder response to proposed behavior change strategies; Presentation/Discussion of results (upon request)
- Survey deliverables include: Final survey questionnaire; Final cleaned data file containing all individual responses to all questions; Verbatim comments from respondents for all open-ended questions; Frequency results and data compendium (detailed crosstabs by demographic and geographic characteristics with significant differences at 95% confidence noted) for all survey questions; Results from consumer segmentation analysis; Comprehensive research report with detailed findings and recommendations and description of methods used for the research and analysis.

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract.

**Note: This proposal seems to focus on the creation and delivery of a campaign rather than just the research and suggested methods for outreach.*

Section IV Cost Proposal

(+) Cost Proposal provided = \$80,000

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: DJ Case

DATE: 3/19/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

Overview – Brief 1986, extensive experience, Highlighted to environmental projects, Clear message projects that involved hunting. Website is good, application less detail Subcontractors , No specified

Organizational Chart clear detailed organization chart, though no mention of who would lead project

Environmental Experience environmental experience with messaging

Staff experience. Some Links to results did not work, the ones that did provided overview of campaign.

Section III Proposed Services – collaborative approach. Did the research on the program and AIS in Maine. Have an informed narrative about Small and behavior change and relate that to Maine CDD. Literature review, focus groups with CBI's Statewide boater survey (online) Billboard?! Actually, mention post survey to assess if the messaging is working. Limited on details

Implementation- Work Plan and Timeline Good timeline outlines tasks and those responsible and when they will be done

Section IV \$79,372 Some detail mostly staff and focus group incentives

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: DJ Case & Associates

DATE: 3/11/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
Very brief overview describes the principals
2. Subcontractors
3. Organizational Chart
Organizational chart doesn't indicate who would work with us on the project.
4. Environmental Experience
(+) project for F&W agencies used focus groups
Doesn't specifically refer to CBSM in their examples; no reference to determining barriers, etc.
5. Staff experience
No meaningful detail connecting the firm's past work with the need expressed in the RFP

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

- (+) kickoff meetings and regular check ins
- (-) takes content out of our RFP which is unnecessary – we know this already.
- (+) good summary statement about voluntary compliance. Don't know page since no page numbers
- (-) refers to WI and MN monitoring but no reference to the study.
- (+) good bulleted summary of current situation regarding what works/doesn't work
- (+) CBSM explicitly mentioned and research related to it
- (-) propose "some time" to...under Literature review

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

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BIDDER NAME: DJ Case & Associates

DATE: 3/11/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

- (+) virtual focus groups with CBIs
- (+) concise summary of statewide boater survey

Implementation- Work Plan and Timeline

- (+) focus groups to refine recommendations for strategies
- (+) post campaign survey end of 2025

Section IV Cost Proposal

\$79,372

\$5K for focus group incentives

Overall thoughts: proposal doesn't delve into details of CBSM (barriers, etc) but seems to present a straightforward approach

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: DJ Case & Associates

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

1. Overview
2. Subcontractors
3. Organizational Chart
4. Environmental Experience
5. Staff experience

+ specialize in conservation & natural resource communications

- communications not social marketing/behavior change

+ website has lots of good examples looks like on website they do behavior change.

+/- no subcontractors

+/- Human dimensions in wildlife – been around awhile. But have they heard CBSM?

? From web site FACILITATORS v barrier removal <https://djcase.com/case-in-point/pitfalls-human-dimensions>

+ One of the first questions I asked was "what do you hope to achieve and, specifically, what do you want people to do as a result of attending your meeting?"

?? lots of good stuff on the web site yet their presentation/application is minimalist. What kind of product will DEP get?

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: DJ Case & Associates

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

+ kick off meeting

+ recognize we can't regulate Maine to prevention

+ p2 (although unnumbered) recognize barriers intercede good intentions.

+ arrow graphic effectively shows process, good process.

+ talk to CBI -focus group

+ online survey

- jump to messaging – well maybe not jump but so much lack of detail seems like a jump. & pilot

+ pilot with 3 online focus groups

- hung up on boaters, don't see other users e.g. fishing

- makes assumptions rather than exploring details of smallest behaviors/behavior chains, barriers.

- staff will be coached to implement campaign

- post campaign evaluation

+/- some good actions but lack of detail – seems skimpy

- not much info re materials to be developed.

- didn't provide deliverables

- wonder about quality of report, level of detail based on proposal

✓ Kick off meeting

✓ Interview/recognize other experts or stakeholders

✓ Lit review

✓ Focus groups (with boat inspectors & with boaters post)

✓ Survey

✓ Develop materials

✓ Test

Marketing Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: DJ Case & Associates

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

+/- ok -

Section IV Coast Proposal (25 points)

\$79,372

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: DJ Case & Associates

DATE: March 8, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
 - Mishawaka, IN
 - Specializes in conservation and natural resource communications.
2. Subcontractors (None specified)
3. Organizational Chart (provided) (+)
4. Environmental Experience
 - Association for Conservation Information; Wildlife Management Institute; Missouri Department of Conservation.
5. Staff experience
 - (+) Has been working for conservation since 1986; Project Manager, Matt Harlow has 40 years experience.**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: DJ Case & Associates

DATE: March 8, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) Describes methods, resources, and how outcomes will be achieved.

- Literature Review
- Virtual Focus Group with Community Boat Inspectors
- Statewide online boater survey
- Develop Messaging/Media
- Virtual focus groups with boaters
- Implement campaign strategies.
- Post-campaign survey

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract.

Section IV Cost Proposal

(+) Cost Proposal provided = \$79,372.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Results marketing & Design dba Ethos

DATE: 3/19/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview – Creating brands and commercial marketing campaigns. 60 employees since 1999. Extensive history of working with Maine state agencies and NGOs . mention identifying priority audiences to target behavior. Mention emotion and values in influencing change in small increments over time.

Subcontractors VONT (2007) performance digital marketing social media design and marketing. Pan Atlantic Research (PAR) to work with us on related market research.

1. outlined in this RFP response. Pan Atlantic brings 38 years of experience.
2. Organizational Chart Provide Detailed organizational chart and outline of experience and background of key staff on the project.
3. Environmental Experience Maine Coast heritage trust project most recently, however this was fundraising
4. Staff experience. Variety and extensive experience in marketing social behavior change social media and branding.

Section III Proposed Services -

Collaborative approach. Clear strategies and deliverables for each phase of the proposal Both qualitative and quantitative approaches. Laid out clearly and organized.

Implementation- Work Plan and Timeline

Clear timeline that designates work and who will be able to do the work. Define roles of DEP and stakeholders in the process.

Section IV Cost Proposal \$79,987.78 details provided including travel, materials

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Results marketing & Design dba Ethos

DATE: 3/19/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ethos aka Results Marketing and Design

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview

(+) significant work in ME with agencies and NGOs

Note that this project is good fit – but doesn't state it's a great fit (see first 'graph)

2. Subcontractors

Pan Atlantic Research

3. Organizational Chart

4. Environmental Experience

A little experience but not a lot; more human resources

MCHT capital campaign

5. Staff experience

Notes social marketing/behavior projects in Maine

(+) summary of CBSM in first paragraph top page 2. But then started sentence with "so." This graph very briefly mentioned barriers and benefits but then goes right into marketing plan. I assume that will be expanded on.

Proposal connects Aroostook county work to our project, e.g., qualitative and quantitative approaches

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ethos aka Results Marketing and Design

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Starts with DEP/stakeholders meeting, then meeting with CBIs (the latter is not high priority).

(+) quantitative research clearly laid out, methodology explained. Will develop codebook to allow for future research to assess trends.

(+) accurately describes potential sampling universe
References response to surveys in western state AIS.

End product from contractor is detailed.

Implementation- Work Plan and Timeline

(+) will write social marketing plan with 2 strategic interventions.

(+) will write brief for development of other materials

(+) notes (p. 5) need to refresh materials including new "Style Tile" but will this work with our current branding...

(+) focus group testing of the two interventions

Do we need to provide incentives for people to attend focus groups? To be held in 2 different areas of the State of Maine

(?) what is significance of acct services graph on P7?

Section IV Cost Proposal

\$ 79,987.78

\$41,000 is contracted

Detailed budget

10% overhead

11 hrs/wk direct staff?

Overall comments on proposal: this proposal explicitly includes the CBSM approach that we think is necessary to move our program forward. The presentation and detail is somewhat cumbersome but the gist is there. Detailed timeline is faster than we can accommodate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Results Marketing & Design/ ETHOS

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

1. Overview
 2. Subcontractors
 3. Organizational Chart
 4. Environmental Experience
 5. Staff experience
- + state of Maine (gov) experience
 - + NGO/environmental experience
 - + social marketing not just commercial experience (health related social marketing)
 - "decades of experience building brands and creating successful commercial marketing campaigns" nice but we are looking to change behavior
 - '60-person multiplatform branding and digital agency'
 - stress 'markets' over behavior P1-2
 - +/- VONT web-based expert (we haven't committed to needing these tools but maybe that is where everything is going these days?)
 - + Pan Atlantic Research for market related research. Seem very capable to handle research.
 - Example 1 – was all research no how info was used and if they changed behavior. Successfully collected the data though 😊
 - + Example 2 – Narcam good example Follow-up evaluation too.
 - Umm the team – was hoping for just the ones working on this project not everyone in the organization but I guess good to show depth ?

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312246

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BIDDER NAME: Results Marketing & Design/ ETHOS

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EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

- + start with meeting DEP and discovery process
- + include stakeholders in the early process/facilitated meeting/immersion. Good list of things to assess
- + Qualitative research – interview 15 CBIs – good idea
- + p3 – good list
- + p 3 testing messages
- +/- will need to work with IFW for contact information for survey. P3
- + complete confidence that Pan Atlantic can run survey – well described process.
- + good components to social marketing plan p 4-5. Makes sense
- + creative brief (not sure others included this ?) makes sense.
- proposing to ‘refresh’ current materials.
- mock ups – not sure if that means final materials we could use or drafts
- + focus groups to evaluate materials
- +/- invite focus group to participate again, in-person 2 locations
- + final report with improvements to the Social Marketing Strategic plan

Kick off meeting

✓ Interview/recognize other experts or stakeholders

Lit review

✓ Focus groups (interview CBI)

✓ Survey

✓ Develop materials (refresh current materials)

✓ Test

✓ Marketing Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Results Marketing & Design/ ETHOS

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

- In 8 months? Not likely

Section IV Coast Proposal (25 points)

\$79,987.78

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ethos

DATE: March 12, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview

- Westbrook, ME
- Experience building brands and creating successful commercial marketing campaigns. A multiplatform marketing agency with specialized knowledge of social/behavior change marketing and communications. (... "understanding the barriers and benefits that lead to developing compelling communication and effective behavior change marketing across multiple platforms.")
- Established in 1999; Employee owned.

2. Subcontractors

(+) Provided information

- Vont (not truly a subcontractor?) – performance digital marketing company (Developed by Ethos; they work in a “hybrid work environment in Westbrook, ME)
- Pan Atlantic Research – Business-to-consumer and business-to-business research and consulting firm.

3. Organizational Chart **(+) Provided (Large team!)**

- Also included Account Team job descriptions.

4. Environmental Experience **(+/-)** – Not many examples of environmental work.

- Maine Coast Heritage Trust (Fundraising Campaign)
- **Non-Environmental Experience:**
 - o Aroostook Health Partnership (Aroostook Agency on Aging – Addressing unmet social needs.)
 - o Office of Behavioral Health (Naloxone Steering Committee – Normalize having Naloxone on hand.)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ethos

DATE: March 12, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

- 5. Staff experience
- (+) Listed in job descriptions

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) Describes methods, resources, and how outcomes will be achieved.

Phase 1: Behavior Prioritization & Barrier/Benefit Research

A. Immersion Session with key stakeholders

B. Implications Report

C. Qualitative Research: Strategic interviews with Certified Boat Inspectors

D. Quantitative Research: Survey of priority audiences

Mentions non-divisible behaviors, barriers and benefits to desired behaviors, looking into previous DEP strategies and existing resources, trusted messengers, opportunities, message testing.

Lists deliverables.

Phase 2: Strategy Recommendations and Design

A. Social marketing strategic plan

B. Creative brief (x2)

C. Style tile and message platform

D. Intervention material mockups (x2)

E. Qualitative Research: focus group pre-pilot testing

F. Research Report and Pilot Testing Plan

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract.

Section IV Cost Proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ethos

DATE: March 12, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

(+) Cost Proposal provided = \$79,987.78

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite

DATE: 3/19/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview – 10 years Marketing insights to grow. Human centered design< yet no clarification what this means. “blend empathy to uncover profound truth”,
2. Subcontractors Changeable – behavior change and marketing group 20 years' experience. Will do most of the groundwork developing behavior change strategies and test cases. Mention pilots no description of what type of pilot.
3. Organizational Chart Provide overall chart with no specifics.
4. Environmental Experience Limited environmental experience. Most experience described was with large corporations.
5. Staff experience See notes above 10/20 years' experience for each project lead.

Section III Proposed Services - relating to the scientific description of peoples and cultures with their customs, habits, and mutual differences.

"ethnographic". describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

IDI (in depth interview?) focus on the Portland area limited interviews, Stakeholder list did not include any actual lake residents thought they did discuss working with lake residents on the water through “ethnographic” observations. Video session DEP team . Ask participants for photos.

Lots of focus on empathy as a means to change behavior. Survey 250 Maine residents 250 non-Maine residents. Include ocean users.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite

DATE: 3/19/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

Provided with some detail, yet really do not specify tools and results

Section IV Cost Proposal 131,500 No detail or cost breakdown

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
Narrative includes words like empathy, intelligence, storytelling, emotion >> "empathy-building practice"
2. Subcontractors
"Changeable" (contractor) with international experience will handle Phase 2
3. Organizational Chart
Briefly describes roles of staff and contractor; short and sweet
4. Environmental Experience
(-) appears to be relatively little env. experience in line with this project
5. Staff experience
(+) significant experience

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

- (+) "Rewind" to get up to speed including up to 6 stakeholder interviews and with "custodians of the water". Virtual AND in-person? I assume the latter would be extra fee (see p. 2 under Step 3.
- (+) DEP virtual workshop
- (?) Ethnographic obs.: 8, 2 hr in person? In Portland area.
- (?) Non-divisible behaviors
- (+) mentions barriers
- (-) misses the boat a bit when mentioning waterfront users.
- (?) what is an IDI?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

will survey ME residents and out of staters who visit ME
why distinction of Portland and outside greater Portland?

(-) qual and quant not explained at the beginning

Not sure this approach is getting to barriers.

why is first line of "Output" strikethrough on p. 2?

(+) details survey specs on page 3 including respondents from outside ME

(+) list of specific outputs of first phase

Implementation- Work Plan and Timeline

Does this workplan follow smoothly from the previously described process? I don't see the flow. This section talks about developing integrated social marketing strategy but I thought that was Phase 1.

Section IV Cost Proposal

\$131,500

Total price only; no details

(?) is this cost proposal closer to the true price of this project?

Overall impression: this proposal is thick with lingo and explanations do not always make the material accessible. Also, overall approach doesn't have a logical flow throughout.

STATE OF MAINE

INDIVIDUAL EVALUATION NOTES

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: March 23-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

- 1. Overview
- 2. Subcontractors
- 3. Organizational Chart
- 4. Environmental Experience
- 5. Staff experience

- Human-centered design (HCD) is a methodology that places the user at the heart of the design process. It seeks to deeply understand users' needs, behaviors and experiences to create effective solutions catering to their unique challenges and desires. V we are looking for CBSM is a form of social marketing that emphasizes direct contact among community members and the systematic removal of structural and other barriers to action, since research suggests that these approaches are often most likely to bring about behavioral change. Close but not the same.

- no mention of government work

- no mention or examples of environmental work

+ social marketing example of health/diet in Kenya by Changeable

+/- Changeable World subcontractor – looks like they will be doing bulk of work.

+/- Division of work logical.

- Doesn’t ID people just positions

STATE OF MAINE

INDIVIDUAL EVALUATION NOTES

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: March 23-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

+ review to get up to speed (Lit search?)

+ Stakeholder interviews

+ possible in-person observations ?

+ starts with what looks like good foundation before diving in too far p1

-/- propose ethnographic (scientific description of peoples and cultures with their customs, habits, and mutual differences.) dive yet say Portland and surrounding areas.

++ in-person interview/observations

++ interesting targeting people in surrounding states – after all that is where a plant is most likely to come from.

+ p2 like brining everyone together for Synthesis

+/- mentions behaviors & benefits – not barriers p3

+ Quant & qual data collection

+ p3-4 good list

+ p5 good list

+ p5 ‘information is not enough to change behavior’ – they get it

+ Phase 2 logical and good outputs

✓ Kick off meeting

✓ Interview/recognize other experts or stakeholders (virtual workshop)

Lit review

Focus groups

✓ Survey

✓ Develop materials (although no so clear how or what)

✓ Test

✓ Marketing Plan

STATE OF MAINE

INDIVIDUAL EVALUATION NOTES

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: March 23-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

+ looks good but

- struggled with abbreviations, need key. Is this a sign of their work?

Section IV Coast Proposal (25 points)

Didn't submit budget on spread sheet – aka didn't follow directions.

\$131,500.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: March 11, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview

- San Francisco, CA
- Global insights and strategy firm.

2. Subcontractors

(+) Provided information

- Changeable: Global behavior-change and marketing consulting agency.
 - o Tasks to Be Delegated Changeable will be responsible for the following tasks associated with PHASE TWO: Strategy Recommendations and Design: a) Design methodology to develop one or more behavior change interventions. b) Identify key messages, materials, channels, and messengers. c) Identify and describe metrics for evaluating the impact of the identified strategies. d) A marketing plan that clearly describes the key messages, materials, channels, and messengers for each strategy to be pilot tested. e) A description of the available metrics for evaluating the impact of the identified strategies. f) A proposed plan for pilot testing one or more strategies

3. Organizational Chart **(+) Provided**

4. Environmental Experience **(+/-)**

- Nestle Waters (single-use plastic)
- **Non-Environmental Experience:**
 - o Ulta Beauty (male beauty)
 - o One Acre Fund (nutrition)

5. Staff experience

(+) 10+ years of experience; Subcontractor has 20 years experience.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: March 11, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) Describes methods, resources, and how outcomes will be achieved.

- Literature Review
- Virtual Focus Group with Community Boat Inspectors
- Statewide online boater survey
- Develop Messaging/Media
- Virtual focus groups with boaters
- Implement campaign strategies.
- Post-campaign survey

Phase 1: Behavior Prioritization & Barrier/Benefit Research

Step 1: Rewind & Hypothesis Session – Output: Clear definition of audiences and sectors for primary research. Summary of key questions to inform discussion guide as well as summary of prior learning to include in ongoing analysis. Synthesized learning will be incorporated into final deliverables for Phase 1 as appropriate.

Step 2: Ethnographic Observation and Virtual IDIs – Output: Data gathered from a diverse range of qualitative voices which will be analyzed and synthesized to be used in the quant survey and help bring to life the overall insights which will help the recommended messaging and approach make sense in the context of the audience’s perspective.

Step 3: Synthesis Session – Output: Identified behaviors/benefits to build the quant survey grounded in the results of the qual research.

Step 4: Quantitative Survey with Maxx Diff – Output: Data collection. Ability to prioritize behaviors based on a quantitative analysis of their applicability, potential impact, existing levels of penetration, and probability of engagement.

Step 5: Analysis, Report, and Application Session – Post research, we will bring to life the learning and the respondents with engaging deliverables with photos where appropriate, quotes and infographics.

Phase 2: Strategy Recommendations and Design

Step 1: Define Theory – Output: Graphically Depicted Theory of Change. Strategy materials including any graphics, print materials, electronic media, promotional items, etc.

Step 2: Design - Output: Strategy brief in Narrative/presentation form that covers key messages, materials, channels, and messengers identified.

Step 3: Operationalize - Output: Operational guidance and monitoring plan describing the key messages, materials, channels, and messengers for each strategy to be pilot

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Ignite 360

DATE: March 11, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

tested. (Includes: Copies of all materials, description of the available metrics; summary of focus groups, proposed plan for pilot testing one or more strategies.

Step 4: Optional Onboarding - Make recommendations for implementation including staffing, organizational structures, change management needs to ensure sustained implementation.

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract.

Section IV Cost Proposal

(-) Cost Proposal provided = \$131,500.00 (*Did not use Excel form provided. Exceeds budget provided in RFP Q/A document.*)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: Marketwise

DATE: 3/19/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview – Newer company under 10 years' experience, mostly in business sector
2. Subcontractors A researcher and other contractor both with some experience yet not extensive.
3. Organizational Chart Provide a small clear chart
4. Environmental Experience Limited
5. Staff experience 4-5 years' experience mostly a one-person operation.

Section III Proposed Services -

Observational research within the state for a year then focus groups (virtual)
Quantitative online survey research. Do discuss the behavior we would like to target.
Provide little detail of how they work with DEP and stakeholders.

Implementation- Work Plan and Timeline

Provide a clear timeline that outlines tasks and who will do the tasks. Also includes results

Section IV Cost Proposal 78,700 mostly staff and travel

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: MarketWise Advising

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
Served Fortune 500 clients
2. Subcontractors
Will use subs
3. Organizational Chart
4. Environmental Experience
(-) don't appear to have significant environmental experience
5. Staff experience
Past work extensive but appears to mostly be in tech products/services

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

states at the top that they will use CBSM principles – and it is spelled out awareness and discussion of timetable and potential changes travel with wardens not priority; notes lake areas to visit. Sounds like someone wants to see maine lakes.

Qualitative: focus groups based on user groups; incentives for individuals

quantitative: sample size discussed

A-J brief statement about each task to be addressed in Phase 1

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: MarketWise Advising

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

will develop one or more intervention strategies. Testing via 1:1 interviews on Teams.
will develop proposed pilot plan then, at completion of Phase 2, will deliver a marketing plan.

Section IV Cost Proposal

\$ 78,700.00

Overall: very short on how DEP will be incorporated into the project.

**-24STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: MarketWise, LLC

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

1. Overview
2. Subcontractors
3. Organizational Chart
4. Environmental Experience
5. Staff experience

- Corporate/commercial experience

- Recent work with irrigation company (this is traditional marketing – trade one tool for another yes it is behavior change but ..)

+ Lots of market research experience – but commercial rather than social

- No social marketing examples

- Sub contractors are also from 'traditional' marketing (PR, branding, advertising)

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

? quals did not lead be to believe that they understood CBSM but proposal is pretty good, but will they be learning as they go?

- no mention of kick off meeting, tapping DEP or others before getting started.

+ like the observational research, good idea.

**-24STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: MarketWise, LLC

DATE: March 18-24, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

+/- virtual focus groups using MS Teams

+ qual and quantitative research (focus groups and online survey)

+/- believe market research, as in traditional is their forte. Tools are the same for behavior change, but the questions and probing maybe different. Believe they can handle.

- Feels less like a partnership and more like they will pop in from time to time as they make progress on the tasks. E.g. no mention of meeting with DEP or other local experts.

+/- pretest with focus groups or small field experiment

Kick off meeting

- ✓ Interview/recognize other experts or stakeholders
- ✓ Lit review (previous DEP material)
- ✓ Focus groups (observational research + focus group)
- ✓ Survey
- ✓ Develop materials
- ✓ Test
- ✓ Marketing Plan

Implementation- Work Plan and Timeline

+/- time line ok but doesn't include DEP meetings in list of activities. It is assumed ?

Section IV Coast Proposal (25 points)

\$78,700

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: MarketWise

DATE: March 11, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
 - Savage, MN
 - Focuses on designing and conducting research, facilitation strategic planning and assisting organizations with marketing execution.
2. Subcontractors
 - (+) Provided information.**
 - Steve Boespflug: Researcher
 - Josh Schneck – Community Outreach Strategist
3. Organizational Chart **(+) Provided**
4. Environmental Experience **(+/-)** – Not many examples of environmental work.
 - Calsense (responsible irrigation practices)
 - **Non-Environmental Experience:**
 - o Calsense
 - o Global Traffic Technologies
5. Staff experience
 - (+) Describes experience of MarketWise founder, Mike Haldene. Describes how subcontractors are chosen based on their expertise in subject matter.**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: MarketWise

DATE: March 11, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+) Describes methods, resources, and how outcomes will be achieved.

- **Phase One: Behavior Prioritization & Barrier/Benefit Research**
 - o Observational Research: understanding enforcement issues.
 - o Focus groups/reporting: Based on water usage categories.
 - o Quantitative research/reporting: Online survey, incentives, analysis, reporting of findings.
- **Phase Two: Strategy Recommendations and Design**
 - o Review of research
 - o Concept development: one or more behavior change interventions consisting of strategies designed to overcome barriers to participate in desired behavior.
 - o Strategy testing/creation of the marketing plan
 - o Draft pilot plan
 - o Report of findings/recommendations
 - o Task Management for deliverables of creative materials.

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract.

Section IV Cost Proposal

(+) Cost Proposal provided = \$78,700.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: We us them inc

DATE: 3/19/2024

EVALUATOR NAME: Denise Blanchette

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

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Individual Evaluator Comments:

Section II Organization Qualifications and Experience

Overview – 10 years experience through out the US Project descriptions are brief outline providing little insight to the work done. Mostly marketing not behavior change Subcontractors

Organizational Chart Organizational chart is a template that is not specific or related to the company.

Environmental Experience None mentioned

Staff experience. Not highlighted

Section III Proposed Services -

The entirety of the proposed services is generic and has few specifics to the services being requested in the RFP. Discuss that they have many tools but never define what those tools might be. The layout and format of the proposed services was cumbersome to read and navigate. Use Gantt Chart and Asana assumed we knew what it was.

Implementation- Work Plan and Timeline

Section IV 80,000 No detail

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: WeUsThem Inc

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview

Important projects are summarized but they are not directly related to our project

visual format of proposal and portrait view is not user friendly

proposal includes the firm's policies on accessibility, cultural competence and diversity; is certified as an Aboriginal or minority business.

2. Subcontractors

None needed.

3. Organizational Chart

4. Environmental Experience

doesn't appear to have significant experience with environmental issues

5. Staff experience

examples show experience in marketing but not CBSM?

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform. will follow CBSM as noted in RFP.

-typos in first paragraph

-Narrative summary of their approach is complete

-use focus groups, stakeholder interviews, online surveys. Also conducting lit review.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: WeUsThem Inc

DATE: 3/12/2024

EVALUATOR NAME: John McPhedran

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Implementation- Work Plan and Timeline

-sample campaign and media workplans seem to jump the gun – out of place for where we are in the current proposal. This discussion on pages 4 and 5 is high level and doesn't include the nuts and bolts that I prefer to see.

-“Brown and Green” dollar conversion points? This feels very much like a canned proposal and like they didn't spend much time thinking about our needs.

-assumes we know Gantt chart...lots here about their internal organization and not the work itself.

Section IV Cost Proposal

\$80k

Overall thoughts on proposal: the format of the proposal with icons and images is distracting. While the content notes our desire for a CBSM approach, there is very little detail about how that will be done in comparison to the firm's organization. I don't think considerable thought about our objectives was considered in developing the proposal.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: We.Us.Them

DATE: March 23-25, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience (30 pts Qualifications + Experience)

1. Overview
2. Subcontractors
3. Organizational Chart
4. Environmental Experience
5. Staff experience

+/- 4 distinct service lines web design, digital development, PR, strategic management -not sure we are looking for any of these. State limits digital and web stuff. Need to know if their expertise is even usable.

- Raise awareness but what about behavior? Lots of awareness raising but no mention of moving to behavior change.

+ experience working with government and noncorporate campaigns

+/- 3 projects don't provide enough info to understand for this lay person what this involved, goals (awareness, behavior change)

(Proposed Services 45pts)

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

+/- nice creative submittal but the font – who the heck can read that? Maybe meant to print as landscape

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: We.Us.Them

DATE: March 23-25, 2024

EVALUATOR NAME: Kathy Hoppe

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

- + goal of 'end state behavior' understanding
- + quant & qual (focus groups and survey)
- + lit review
- + barriers and benefits
- + p1 outcome good
- + ends with marketing plan
- + stakeholder interviews
- while it maybe the case that all efforts follow the same pattern the 'sample' plans maybe too generic /lack specificity.
- p10 pilot testing plan – doesn't actually say they will test it with a focus group or anyone else. Not sure if they are doing all we asked ???
- seems like generic proposal, doesn't feel like they are paying attention to us, showing us they thought about our project

Kick off meeting

- ✓ Interview/recognize other experts or stakeholders
- ✓ Lit review
- ✓ Focus groups
- ✓ Survey
- ✓ Develop materials
- ✓ Test
- ✓ Marketing Plan (sample?)

Implementation- Work Plan and Timeline

- Not reasonable – both phases completed in 7 months – not likely, Doesn't take into account client's schedule and needs. Unrealistic

Section IV Coast Proposal (25 points)

\$80,000

- No details, just a number. Did they read the RFP ?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: We Us Them

DATE: March 12, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Section II Organization Qualifications and Experience

1. Overview
 - Halifax, Nova Scotia, Canada
2. Subcontractors

None
3. Organizational Chart (+)
4. Environmental Experience (-) – No examples of environmental work.
 - Non-Environmental Experience:
 - o State of Wyoming (WIC – awareness campaign)
 - o City of Saskatoon (Active Transportation)
 - o City of Columbus (Community awareness of mental health issues)
 - o College of Immigrations and Citizenship Consultants (Raise awareness of the College and it's purpose and role in preventing immigration fraud).
 - o Initiative to end gender based violence.
 - o Centre for Addiction and Mental Health to combat child sexual abuse.
5. Staff experience

(+) A decade of experience in marketing and communications.

 - Taryn Crosby (4 years of experience as Account Manager @ We Us Them)

DEI Competence – lists several policies related to diversity, equity, inclusion.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

BIDDER NAME: We Us Them

DATE: March 12, 2024

EVALUATOR NAME: Toni Pied

EVALUATOR DEPARTMENT: Maine Department of Environmental Protection

Section III Proposed Services - describe the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

(+/-) Briefly describes methods, resources, and how outcomes will be achieved.

- Exploration of behaviors critical to reducing AIS
- Quantitative and qualitative analysis/research.
- Prioritize behaviors based on potential impact, levels of penetration, and likelihood of engagement.
- Develop a suite of behavior change interventions.
- Creation of creative materials and promotional items.
- Key messages, channels, and messengers.
- Solicit stakeholder input.
- Deliver a Marketing Plan

Implementation- Work Plan and Timeline

(+) Work Plan/Timeline provided – may need to adjust dates according to start of contract.

Section IV Cost Proposal

(-) Cost Proposal provided = \$80,000 (did not use Excel form provided for budget)



STATE OF MAINE
DEPARTMENT OF Environmental
Protection

Janet T. Mills
Governor

Melanie Loyzim
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

I, Denise Blanchette

_____ accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Environmental Protection. 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.

3/4/2024

Signature

Date



STATE OF MAINE
DEPARTMENT OF Environmental
Protection

Janet T. Mills
Governor

Melanie Loyzim
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312246

**RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive
Species**

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

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Handwritten signature of John McPhedran in black ink.

Signature

03/04/2024

Date



STATE OF MAINE
DEPARTMENT OF Environmental
Protection

Janet T. Mills
Governor

Melanie Loyzim
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202312246

RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive Species

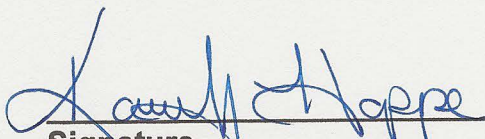
I, _____ Kathy Hoppe _____ accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Environmental Protection. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection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

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Signature

3/4/2024

Date



STATE OF MAINE
DEPARTMENT OF Environmental
Protection

Janet T. Mills
Governor

Melanie Loyzim
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202312246

**RFP TITLE: Social Marketing Research and Plan for Prevention of Aquatic Invasive
Species**

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Toni B. Pied

3/04/2024

Signature

Date