**STATE OF MAINE**

**Department of Economic & Community Development**

*Maine Office of Tourism*



**RFP# 202501015**

**Research Services**

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| --- | --- | --- |
| **RFP Coordinator** | **NAME:** | Kimbalie Lawrence |
| **TITLE:** | Grant Administrator |
| **EMAIL:** | [Kimbalie.lawrence@maine.gov](mailto:Kimbalie.lawrence@maine.gov) |
| *All communication regarding the RFP must be made through the RFP Coordinator.* | | |

|  |  |
| --- | --- |
| **Submitted Questions Due Date** | February 18th, 2025, no later than 11:59 p.m., local time |
| *All questions must be received by the RFP Coordinator by the date and time listed above.* | |

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| --- | --- | --- |
| **Proposal Submission Deadline** | **DATE:** | March 6th, 2025, no later than 11:59 p.m., local time. |
| **TO:** | [Proposals@maine.gov](mailto:Proposals@maine.gov) |
| *Proposals must be received electronically by the Office of State Procurement Services by the date and time listed above.* | | |

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PUBLIC NOTICE

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**State of Maine**

**Department of Economic and Community Development**

**Maine office of Tourism**

**RFP# 202501015**

**Research Services**

The State of Maine is seeking proposals for Visitor Profile Research, Economic Impact Research and Marketing & Media Effectiveness Research Services.

A copy of the RFP and all related documents can be obtained at: <https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps>

Proposals must be submitted to the Office of State Procurement Services, via e-mail, at: [Proposals@maine.gov](mailto:Proposals@maine.gov). Proposal submissions must be received no later than 11:59 p.m., local time, on March 6th, 2025. Proposals will be opened the following business day.

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**RFP TERMS/ACRONYMS with DEFINITIONS**

The following terms and acronyms, as referenced in the RFP, have the meanings indicated below:

|  |  |
| --- | --- |
| **Term/Acronym** | **Definition** |
| **Department** | Department of Economic & Community Development |
| **DMAs** | Designated Marketing Areas |
| **MOT** | Maine Office of Tourism |
| **RFP** | Request for Proposal |
| **ROI** | Return on Investment |
| **State** | State of Maine |

**State of Maine**

**Department of Economic and Community Development**

**Maine office of Tourism**

**RFP# 202501015**

**Research Services**

**PART I INTRODUCTION**

1. **Purpose and Background**

The Department of Economic and Community Development (Department) is seeking Research Services for the Maine Office of Tourism as defined in this Request for Proposals (RFP) document. This document provides instructions for submitting proposals, the procedure and criteria by which the awarded Bidder will be selected, and the contractual terms which will govern the relationship between the State of Maine (State) and the awarded Bidder.

The Department seeks to establish one or more contracts to conduct the following research services for the Office of Tourism:

1. **Visitor Profile Research** to determine visitor volume to Maine and provide an in-depth profile of these visitors in demographic, psychographic and socioeconomic terms and to categorize visitors into various traveler segments as may be defined by the Department’s segmentation typing tool. Visitor Profile Research will capture information related to trip characteristics, travel habits, tourist interests and perceptions of Maine, as well as identify differences between first-time visitors and repeat visitors. The results from previous years’ Visitor Profile Research may be found at: <https://motpartners.com/wp-content/uploads/2024/04/Maine-Office-of-Tourism-CY2023-Visitor-Tracking-Report-UPDATED-JOBS-FOR-PREVIOUS-YEARS-1.pdf>.
2. **Economic Impact Analysis** for the Maine travel and tourism industry evaluating the travel year 2025. Impact figures are to be reported for the state of Maine and its eight tourist regions. The main objective for the Economic Impact Research is to measure the economic impact of tourism to Maine in terms of total sales, jobs supported, resident income and taxes generated. Research will also estimate levels of direct and indirect spending to assess the economic impacts of tourism by season and region. The results from previous Economic Impact Research can be found at: <https://motpartners.com/wp-content/uploads/2024/05/MOT_GovCon_HighlightSheet_2023_Printed-Paper_FNL-0430.pdf>.
3. **Marketing & Media Effectiveness Research** to evaluate the Maine Office of Tourism’s seasonal marketing campaigns. The Maine Office of Tourism has a goal of becoming nimbler with its paid media efforts and having insights around progress toward meeting our marketing and business goals on an on-going basis, rather than waiting until traditional research reports are published. This research must provide in-depth analysis of print, television, digital, out-of-home, social media and other specialized/non-traditional advertising. At a minimum, this research will: measure advertising awareness and recall, determine advertising effectiveness in communicating its intended message, determine an understanding of motivation and involvement, compare Maine’s top of the funnel metrics (e.g., destination awareness, consideration and likelihood to visit), determine how advertising impacted consumers at various commitment levels of interest in traveling to Maine, determine volume of incremental travelers/trips and provide the Maine Office of Tourism’s Return on Investment (ROI).
4. **General Provisions**
   1. From the time the RFP is issued until award notification is made, all contact with the State regarding the RFP must be made through the RFP Coordinator. No other person/ State employee is empowered to make binding statements regarding the RFP. Violation of this provision may lead to disqualification from the bidding process, at the State’s discretion.
   2. Issuance of the RFP does not commit the Department to issue an award or to pay expenses incurred by a Bidder in the preparation of a response to the RFP. This includes attendance at personal interviews or other meetings and software or system demonstrations, where applicable.
   3. All proposals must adhere to the instructions and format requirements outlined in the RFP and all written supplements and amendments (such as the Summary of Questions and Answers), issued by the Department. Proposals are to follow the format and respond to all questions and instructions specified below in the “Proposal Submission Requirements” section of the RFP.
   4. Bidders will take careful note that in evaluating a proposal submitted in response to the RFP, the Department will consider materials provided in the proposal, information obtained through interviews/presentations (if any), and internal Departmental information of previous contract history with the Bidder (if any). The Department also reserves the right to consider other reliable references and publicly available information in evaluating a Bidder’s experience and capabilities.
   5. The proposal must be signed by a person authorized to legally bind the Bidder and must contain a statement that the proposal and the pricing contained therein will remain valid and binding for a period of 180 days from the date and time of the bid opening.
   6. The RFP and the awarded Bidder’s proposal, including all appendices or attachments, will be the basis for the final contract, as determined by the Department.
   7. Following announcement of an award decision, all submissions in response to this RFP will be public records, available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA) ([1 M.R.S. § 401](http://www.mainelegislature.org/legis/statutes/1/title1sec401.html) et seq.). State contracts and information related to contracts, including bid submissions, are generally public records per FOAA.
   8. In the event that a Bidder believes any information that it submits in response to this RFP is confidential, it must mark that information accordingly, and include citation to legal authority in support of the Bidder’s claim of confidentiality. In the event that the Department receives a FOAA request that includes submissions marked as confidential, the Department shall evaluate the information and any legal authority from the Bidder to determine whether the information is an exception to FOAA’s definition of public record. If the Department determines to release information that a Bidder has marked confidential, it shall provide advance notice to the Bidder to allow for them to seek legal relief.
   9. The Department, at its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to the RFP.
   10. All applicable laws, whether or not herein contained, are included by this reference. It is the Bidder’s responsibility to determine the applicability and requirements of any such laws and to abide by them.
5. **Eligibility to Submit Bids**

All interested, qualified parties are invited to submit bids in response to this Request for Proposals.

1. **Contract Term**

The Department is seeking cost-efficient proposals to provide services, as defined in this RFP, for the anticipated contract period defined in the table below. The dates below are estimated and may be adjusted, as necessary, in order to comply with all procedural requirements associated with the RFP and the contracting process. The actual contract start date will be established by a completed and approved contract.

Contract Renewal: Following the initial term of the contract, the Department may opt to renew the contract for 2 renewal periods, as shown in the table below, and subject to continued availability of funding and satisfactory performance.

The term of the anticipated contract, resulting from the RFP, is defined as follows:

|  |  |  |
| --- | --- | --- |
| **Period** | **Start Date** | **End Date** |
| Initial Period of Performance | May 1, 2025 | April 30, 2027 |
| Renewal Period #1 | May 1, 2027 | April 30, 2029 |
| Renewal Period #2 | May 1, 2029 | April 30, 2030 |

1. **Number of Awards**

The Department anticipates making multiple awards as a result of this RFP process.

Bidders interested in providing services for multiple research components (1) Visitor Profile Research; (2) Economic Impact Analysis; and/or (3) Marketing & Media Effectiveness Research must submit a **separate proposal** for each research component.

Bidders should bid only on the research studies that fall within their capabilities/qualifications.

**PART II SCOPE OF SERVICES TO BE PROVIDED**

1. **Visitor Profile Research/Overnight and Day Visitor Surveys**
   1. Provide in-depth visitor data by contacting respondents who have visited Maine as a destination, evaluating the most recent travel year (2025). While we do not anticipate exact replication of previous years’ methodologies, we will require the awarded Bidder(s) to review data from previous years and identify instances where results can be compared.

# Ensure representative sample of Overnight and Day Visitors to Maine. The following DMAs are targeted in marketing and media efforts and *ideally* need to be included in sufficient ending sample sizes to enable guidance for future geographic media decision-making:

# New England – with emphasis on the Greater Boston Area;

# Mid-Atlantic DMAs;

# Charlotte, NC;

# Raleigh-Durham, NC;

# Baltimore, MD;

# Philadelphia, PA;

# Washington, DC;

# Atlanta, GA;

# New York City DMA – with emphasis on Manhattan and boroughs;

# Southeastern DMAs;

# Tampa-St. Petersburg, Florida;

# Midwestern DMAs; and

# Chicago, Illinois;

# Canada DMAs;

# New Brunswick;

# Ontario;

# Quebec;

# Nova Scotia.

# Ensure a sufficient sample of Overnight and Day visitors are surveyed.

# Implement a Department-approved Annual plan for completing surveys,Winter, Spring/Summer, Fall, and by DMA.

# Develop a comprehensive questionnaire that respondents will be asked to complete. At a minimum the questionnaire content must include:

# A map of Maine with the eight tourist regions (see **Appendix F**)

# Demographics;

# History of prior visitation to Maine;

# Trip planning and booking, information sources used, including both industry and media sources, use of travel agents, welcome centers and the internet;

# Travel motivators (i.e. what motivates the consumer to travel? Spending time with family, sightseeing, fishing, once-in-a-lifetime experience, etc.);

# Transportation and accommodations used;

# Itinerary within Maine and specific tourism attractions seen and experienced;

1. Expenditures in Maine (i.e. rental cars, gasoline, accommodations, gifts, restaurant food, sports equipment, recreation, attraction admissions, clothing etc.);
2. Visitor Origin (DMA/State/Country);
3. Volume of travel; estimated number of domestic Overnight and Day Visitors; and
4. Impressions of Maine following the trip, specifically how likely they are to recommend Maine.
   1. Tabulate and analyze the data seasonally with topline reports delivered following each season and a full, comprehensive report delivered no later than March 1, 2026, and annually thereafter for subsequent years. The following reports must be presented:
5. Three (3) Seasonal Topline Reports: Winter, Spring/Summer, Fall;
6. One (1) comprehensive Annual Report;
7. Eight (8) individual annual Regional Reports;
8. One (1) annual First-Time/Repeat Visitors Report; and
9. One (1) annual Canadian Visitor Report.
   1. The final Visitor Profile report must include a section describing:
10. U.S. and New England Visitor Volume, Profile and Consumer Travel Trends;
11. Maine Visitor Volume and year-over-year change;
12. How Maine Visitor Volume compares to U.S. and New England by identifying market share and competitive position; and
13. Maine visitor profile related to planning, booking and trip characteristics such as party size, mode of travel, length of stay, participation in specific activities, trip expenditures and more. This section will include any pertinent tables and graphs.

# **Economic Impact Analysis**

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# Provide an Economic Impact Analysis for the Maine travel industry to evaluate the travel year 2025. While we do not anticipate exact replication of previous years’ methodologies, we will require the Provider to review data from previous years and identify instances where results can be compared. Impact figures are to be reported for the State of Maine and its eight (8) tourist regions (see **Appendix F**). The main objective for the Economic Impact Analysis is to measure the economic impact of tourism to Maine in terms of total sales, jobs supported, resident earnings and taxes generated. Earnings include wages for hourly and salaried workers as well as the income of working proprietors.

# Tabulate and analyze the results from the Economic Impact Analysis for each travel year with the results included in a comprehensive report to describe the economic significance of travel and tourism for the State and each of the eight (8) tourist regions (see **Appendix F**). The report and an evaluation of the effort for the State will be presented to the Department by way of written presentation no later than March 1, 2026, and annually thereafter for subsequent years. Reports and evaluations for the eight tourist regions must be presented no later than April 1, 2026, and annually thereafter for subsequent years.

1. The comprehensive report must include the following:
2. Direct tourism expenditures in the following industries:
3. Retail Sales;
4. Restaurant/Food;
5. Transportation;
6. Gasoline;
7. Lodging; and
8. Recreation.
9. Secondary, or indirect and induced, economic impact of tourism in:
10. Total sales;
11. The number direct and indirect jobs supported;
12. Total earnings; and
13. Tax revenue.
14. Direct economic impacts by visitor origin/residence:
15. Out-of-state visitors, Overnight and Day;
16. First time visitors;
17. Canadian visitors; and
18. Visitor segments as identified by the Department.
19. Describe the methodology to be used, specifically:
20. The research methodology and model, the pros and cons of this method and model overall, and in comparison, to the IMPLAN and RIMSII models which have historically been used. For any proprietary or “black box” models that might be recommended, it must include sufficiently detailed description of inputs, estimating factors/variables, assumptions, etc. that affect outputs, impacts and accuracy.
21. The type of methodology/data collection you propose to measure visitor spending in Maine and data sources to be included.
22. Explain why this model provides the most accurate and reliable estimates of visitor spending and economic impact of travel and tourism at the state level.
23. Provide details on how you will benchmark visitor spending against the data provided by the state of Maine to retail sales tax, lodging tax, restaurant tax, gasoline tax or other similar data. State of Maine Taxable Sales Data is available at: <http://www.maine.gov/revenue/research/sales/homepage.html>.
24. Provide details on how regional analysis for the eight (8) Maine tourist regions, see **Appendix F**, will be conducted and what data sources will be used.
25. Provide details on how seasonal analysis will be conducted and what data sources will be used.
26. Describe workflow processes and proposed timeline to meet project evaluation dates and provide a schedule, timeline and anticipated deliverables.
27. Provide any other information you believe is relevant to this project.
28. Provide details of built-in checks and balances to ensure the model outputs reasonably reflect actual data (for example, reported direct expenditure can be rationalized against taxable sales, etc.).

# **Marketing & Media Effectiveness Study**

# Undertake three (3) Marketing & Media Effectiveness studies to evaluate the Maine Office of Tourism’s seasonal marketing campaigns (Winter, Spring/Summer, Fall). The results of each study must be included in a comprehensive, final report that includes actionable conclusions and implications. Use and define a sufficiently large sample in markets where advertising is run so that market-to-market comparisons can be made. Qualified respondents must be non-Maine households who have taken a leisure trip to Maine.

# Measure and report on the following:

1. Awareness of the Maine promotional message, including awareness of Maine’s travel advertising, recall of the advertising message and content, and changes in awareness over time, and differences by market of origin.
2. Attitudes, opinions and perceptions of Maine’s travel advertising and public relations efforts.
3. Awareness of Maine as a travel destination and recall of social media efforts, with key differences among markets of origin, and changes in awareness over time.
4. Attitudes, opinions, and perceptions of Maine’s social media efforts.
5. Travel behavior including trip profile information (e.g. length of stay, purpose, etc.).
6. Whether the advertising is communicating the intended message about Maine.
7. The impact of advertising in generating travel to the State of Maine.
8. The relative impact of the various media types used to include but not limited to, television, print, radio, out-of-home, direct marketing, online, email marketing, social media and public relations.
9. Types of information potential visitors seek or utilize after seeing a Maine ad in order to become an actual visitor (e.g., what data sources are utilized, what actions are taken, etc.).
10. The marketing campaign’s return-on-investment (ROI) for U.S. and Canadian visitors.
11. A determination of how the advertising impacts consumers at various commitment levels of travel to Maine; and
12. Provide insight into, but not limited to possible deficiencies of the advertising; elements of the advertising which are worthwhile; advertising effects awareness, consideration, visitation and imagery; and, recommendations for strategic advertising.

# Provide details about the data collection process, including:

1. The number of surveys to be completed for each of Maine’s DMAs listed below to reflect a representative sample (which is subject to change):
2. New England states - with emphasis on the Greater Boston Area;
3. Mid-Atlantic DMAs;

# Charlotte, NC;

# Raleigh-Durham, NC;

# Baltimore, MD;

# Philadelphia, PA;

# Washington, DC;

# Atlanta, GA; and

# New York City DMA - with emphasis on Manhattan and boroughs;

1. Southeastern DMAs;

# a. Tampa – St. Petersburgh, Florida;

1. Midwestern DMAs;

# a. Chicago, Illinois;

1. Canada;

# New Brunswick;

# Ontario;

# Quebec; and

# Nova Scotia.

# Calculate the Return on Investment (ROI), include details on how the ROI is calculated.

# The results from the Marketing & Media Effectiveness research must be tabulated and analyzed with the results to be included in a comprehensive report that will include actionable conclusions and implications. The results must be reported no later than March 1, 2026, and annually thereafter for subsequent years.

# **Innovative and Real-Time Reporting**

Utilize tools, techniques, software or other innovative means to gauge real-time progress and support in-process/on-the-fly decision-making.

1. **Other Research Requirements**

From time to time, the Department may request additional specific research tasks. This may include polling of visitors or inquirers that will assist the Department in improving its marketing messaging, or mining of existing data to provide further insight and direction. The Department may also require Provider(s) to present research findings to industry groups as directed by the Department. In such instances a project summary and general cost profile for such supplemental tasks must be provided for Departmental approval.

**PART III KEY RFP EVENTS**

1. **Questions**
   1. **General Instructions:** It is the responsibility of all Bidders and other interested parties to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions.
      1. Bidders and other interested parties should use **Appendix E** (Submitted Questions Form) for submission of questions. If used, the form is to be submitted as a WORD document.
      2. Questions must be submitted, by e-mail, and received by the RFP Coordinator identified on the cover page of the RFP as soon as possible but no later than the date and time specified on the RFP cover page.
      3. The RFP Number and Title must be included in the subject line of the e-mail containing the submitted questions. The Department assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt.
   2. **Question & Answer Summary:** Responses to all questions will be compiled in writing and posted on the following website no later than seven (7) calendar days prior to the proposal due date: [Office of State Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain a copy of the Question & Answer Summary. Only those answers issued in writing on this website will be considered binding.
2. **Amendments**

All amendments released in regard to the RFP will also be posted on the following website: [Office of State Procurement Services RFP Page](https://www.maine.gov/dafs/bbm/procurementservices/vendors/rfps). It is the responsibility of all interested parties to go to this website to obtain amendments. Only those amendments posted on this website are considered binding.

1. **Proposal Submission**
   1. **Proposals Due:** Proposals must be received no later than 11:59 p.m. local time, on the date listed on the cover page of the RFP.
      1. Any e-mails containing original proposal submissions or any additional or revised proposal files, received after the 11:59 p.m. deadline, will be rejected without exception.
   2. **Delivery Instructions:** E-mail proposal submissions must be submitted to the Office of State Procurement Services at [Proposals@maine.gov](mailto:Proposals@maine.gov).
      1. Only proposal submissions received by e-mail will be considered. The Department assumes no liability for assuring accurate/complete e-mail transmission and receipt.
         1. Proposal submission e-mails that are successfully received by the [proposals@maine.gov](mailto:proposals@maine.gov) inbox will receive an automatic reply stating as such.
      2. E-mails containing links to file sharing sites or online file repositories will not be accepted as submissions. Only e-mail proposal submissions that have the actual requested files attached will be accepted.
      3. Encrypted e-mails received which require opening attachments and logging into a proprietary system will not be accepted as submissions. Bidders should work with their Information Technology team to ensure that the proposal submission will not be encrypted due to any security settings.
      4. File size limits are 25MB per e-mail. Bidders may submit files separately across multiple e-mails, as necessary, due to file size concerns. All e-mails and files must be received by the due date and time listed above.
   3. **Submission Format:**
      1. Bidders are to insert the following into the subject line of their e-mail proposal submission: **“RFP# 202501015 Proposal Submission – [Bidder’s Name]”**
      2. Bidder’s proposal submissions are to be broken down into multiple files, with each file named as it is titled in bold below, and include:

* **File 1 [Bidder’s Name] – Preliminary Information:**

*PDF format preferred*

**Appendix A** (Proposal Cover Page)

**Appendix B** (Responsible Bidder Certification)

All required eligibility documentation stated in PART IV, Section I.

* **File 2 [Bidder’s Name] – Organization Qualifications and Experience:**

*PDF format preferred*

**Appendix C** (Organization Qualifications and Experience Form) and all required information and attachments stated in PART IV, Section II.

* **File 3 [Bidder’s Name] – Proposed Services:**

*PDF format preferred*

All required information and attachments stated in PART IV, Section III.

* **File 4 [Bidder’s Name] – Cost Proposal:**

*PDF format preferred*

**Appendix D** (Cost Proposal Form) and all required information and attachments stated in PART IV, Section IV.

**PART IV PROPOSAL SUBMISSION REQUIREMENTS**

This section contains instructions for Bidders to use in preparing their proposals. The Department seeks detailed yet succinct responses that demonstrate the Bidder’s qualifications, experience, and ability to perform the requirements specified throughout the RFP.

Bidders’ proposals must follow the outline used below, including the numbering, section, and sub-section headings. Failure to use the outline specified in PART IV, or failure to respond to all questions and instructions throughout the RFP, may result in the proposal being disqualified as non-responsive or receiving a reduced score. The Department, and its evaluation team, has sole discretion to determine whether a variance from the RFP specifications will result either in disqualification or reduction in scoring of a proposal. Rephrasing of the content provided in the RFP will, at best, be considered minimally responsive.

Bidders are not to provide additional attachments beyond those specified in the RFP for the purpose of extending their response. Additional materials not requested will not be considered part of the proposal and will not be evaluated. Bidders must include any forms provided in the submission package or reproduce those forms as closely as possible. All information must be presented in the same order and format as described in the RFP.

**Proposal Format and Contents**

**Section I Preliminary Information** (File #1)

* 1. **Proposal Cover Page**

Bidders must complete **Appendix A** (Proposal Cover Page). It is critical that the cover page show the specific information requested, including Bidder address(es) and other details listed. The Proposal Cover Page must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

* 1. **Responsible Bidder Certification**

Bidders must complete **Appendix B** (Responsible Bidder Certification). The Responsible Bidder Certification must be dated and signed by a person authorized to enter into contracts on behalf of the Bidder.

**Section II Organization Qualifications and Experience** (File #2)

* 1. **Overview of the Organization**

Bidders must complete **Appendix C** (Qualifications and Experience Form) describing their qualifications and skills to provide the requested services in the RFP. Bidders must include three (3) examples of projects which demonstrate their experience and expertise in performing these services, as well as highlighting the Bidder’s stated qualifications and skills.

* 1. **Subcontractors**

If subcontractors are to be used, Bidders must provide a list that specifies the name, address, phone number, contact person, and a brief description of the subcontractors’ organizational capacity and qualifications.

* 1. **Litigation**

Bidders must attach a list of all current litigation in which the Bidder is named and a list of all closed cases that have closed within the past five (5) years in which the Bidder paid the claimant either as part of a settlement or by decree.  For each, list the entity bringing suit, the complaint, the accusation, amount, and outcome.

* 1. **Certificate of Insurance**

Bidders must provide a certificate of insurance on a standard ACORD form (or the equivalent) evidencing the Bidder’s general liability, professional liability and any other relevant liability insurance policies that might be associated with the proposed services.

**Section III Proposed Services** (File #3)

* 1. **Services to be Provided**

Bidders must discuss the Scope of Services referenced above in Part II of the RFP and what the Bidder will offer, including a description of the methods and resources the Bidder will use and how each task involved will be accomplished. Bidders must also describe how the expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, Bidders must clearly identify the work each will perform.

* 1. Provide a sample plan which:
     1. Lists the number of completed surveys within a year, by season: Winter, Spring/Summer, Fall, and by DMA:
     2. Describes workflow processes and a proposed timeline to meet reporting dates and provide a schedule, timeline and anticipated deliverables; and
     3. Provides any other information you believe is relevant to this study.

**Section IV Cost Proposal** (File #4)

* 1. **General Instructions**
     1. Bidders must submit a cost proposal that covers each Calendar year of the proposed project
     2. The cost proposal must include the costs necessary for the Bidder to fully comply with the contract terms, conditions, and RFP requirements.
     3. No costs related to the preparation of the proposal for the RFP, or to the negotiation of the contract with the Department, may be included in the proposal. Only costs to be incurred after the contract effective date that are specifically related to the implementation or operation of contracted services may be included.
  2. **Cost Proposal Form Instructions**

Bidders must fill out **Appendix D** (Cost Proposal Form), following the instructions detailed here and in the form. Failure to provide the requested information, and to follow the required cost proposal format provided, may result in disqualification or reduction in scoring of the cost proposal, at the discretion of the Department.

**PART V PROPOSAL EVALUATION AND SELECTION**

Evaluation of the submitted proposals will be accomplished as follows:

1. **Evaluation Process – General Information**
   1. An evaluation team, composed of qualified reviewers, will judge the merits of the proposals received in accordance with the criteria defined in the RFP.
   2. Officials responsible for making decisions on the award selection will ensure that the selection process accords equal opportunity and appropriate consideration to all who are capable of meeting the specifications. The goals of the evaluation process are to ensure fairness and objectivity in review of the proposals and to ensure that the contract is awarded to the Bidder whose proposal provides the best value to the State of Maine.
   3. The Department reserves the right to communicate and/or schedule interviews/presentations with Bidders, if needed, to obtain clarification of information contained in the proposals received. The Department may revise the scores assigned in the initial evaluation to reflect those communications and/or interviews/presentations.
   4. Changes to proposals, including updating or adding information, will not be permitted during any portion of the evaluation process. Therefore, Bidders must submit proposals that present their rates and other requested information as clearly and completely as possible.
2. **Scoring Weights and Process**
   1. **Scoring Weights:** Proposal scores will be based on a 100-point scale and will measure the degree to which each proposal meets the following criteria:

|  |  |  |
| --- | --- | --- |
| **Section I.** | **Preliminary Information**  Proposal materials to be evaluated in this section: all elements addressed in Part IV, Section I of the RFP. | **No Points** |
| **Section II.** | **Organization Qualifications and Experience** Proposal materials to be evaluated in this section: all elements addressed above in Part IV, Section II of the RFP. | **35 points** |
| **Section III.** | **Proposed Services**  Proposal materials to be evaluated in this section: all elements addressed above in Part IV, Section III of the RFP. | **35 points** |
| **Section IV.** | **Cost Proposal**  Proposal materials to be evaluated in this section:all elements addressed above in Part IV, Section IV of the RFP. | **30 points** |

* 1. **Scoring Process:** For proposals that demonstrate meeting the eligibility requirements in Section I, if applicable, the evaluation team will use a consensus approach to evaluate and score Sections II & III above. Members of the evaluation team will not score those sections individually but, instead, will arrive at a consensus as to assignment of points for each of those sections. Section IV, the Cost Proposal, will be scored as described below.
  2. **Scoring the Cost Proposal:** The total cost proposed for conducting all the functions specified in the RFP will be assigned a score according to a mathematical formula. The lowest bid will be awarded 30 points. Proposals with higher bid values will be awarded proportionately fewer points calculated in comparison with the lowest bid.

The scoring formula is:

(Lowest submitted cost proposal / Cost of proposal being scored) x 30 = pro-rated score

No Best and Final Offers: The State of Maine will not seek or accept a best and final offer (BAFO) from any Bidder in this procurement process.  All Bidders are expected to provide their best value pricing with the submission of their proposal.

* 1. **Negotiations: The** Department reserves the right to negotiate with the awarded Bidder to finalize a contract. Such negotiations may not significantly vary the content, nature or requirements of the proposal or the Department’s Request for Proposal to an extent that may affect the price of goods or services requested. The Department reserves the right to terminate contract negotiations with an awarded Bidder who submits a proposed contract significantly different from the proposal they submitted in response to the advertised RFP. In the event that an acceptable contract cannot be negotiated with the highest ranked Bidder, the Department may withdraw its award and negotiate with the next-highest ranked Bidder, and so on, until an acceptable contract has been finalized. Alternatively, the Department may cancel the RFP, at its sole discretion.

1. **Selection and Award**
   1. The final decision regarding the award of the contract will be made by representatives of the Department subject to approval by the State Procurement Review Committee.
   2. Notification of conditional award selection or non-selection will be made in writing by the Department.
   3. Issuance of the RFP in no way constitutes a commitment by the State of Maine to award a contract, to pay costs incurred in the preparation of a response to the RFP, or to pay costs incurred in procuring or contracting for services, supplies, physical space, personnel or any other costs incurred by the Bidder.
   4. The Department reserves the right to reject any and all proposals or to make multiple awards.
2. **Appeal of Contract Awards**

Any person aggrieved by the award decision that results from the RFP may appeal the decision to the Director of the Bureau of General Services in the manner prescribed in [5 M.R.S.A. § 1825-E](http://www.mainelegislature.org/legis/statutes/5/title5sec1825-E.html) and [18-554 Code of Maine Rules Chapter 120](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-120).  The appeal must be in writing and filed with the Director of the Bureau of General Services, 9 State House Station, Augusta, Maine, 04333-0009 within 15 calendar days of receipt of notification of conditional contract award.

**PART VI CONTRACT ADMINISTRATION AND CONDITIONS**

1. **Contract Document**
   1. The awarded Bidder will be required to execute a State of Maine Service Contract with appropriate riders as determined by the issuing department.

The complete set of standard State of Maine Service Contract documents, along with other forms and contract documents commonly used by the State, may be found on the Office of State Procurement Services’ website at the following link: [Office of State Procurement Services Forms Page](https://www.maine.gov/dafs/bbm/procurementservices/forms)

* 1. Allocation of funds is final upon successful negotiation and execution of the contract, subject to the review and approval of the State Procurement Review Committee. Contracts are not considered fully executed and valid until approved by the State Procurement Review Committee and funds are encumbered. No contract will be approved based on an RFP which has an effective date less than fourteen (14) calendar days after award notification to Bidders. (Referenced in the regulations of the Department of Administrative and Financial Services, [Chapter 110, § 3(B)(i)](https://www.maine.gov/dafs/bbm/procurementservices/policies-procedures/chapter-110).)

This provision means that a contract cannot be effective until at least 14 calendar days after award notification.

* 1. The State recognizes that the actual contract effective date depends upon completion of the RFP process, date of formal award notification, length of contract negotiation, and preparation and approval by the State Procurement Review Committee. Any appeals to the Department’s award decision(s) may further postpone the actual contract effective date, depending upon the outcome. The contract effective date listed in the RFP may need to be adjusted, if necessary, to comply with mandated requirements.
  2. In providing services and performing under the contract, the awarded Bidder must act as an independent contractor and not as an agent of the State of Maine.

1. **Standard State Contract Provisions**
   1. Contract Administration

Following the award, a Contract Administrator from the Department will be appointed to assist with the development and administration of the contract and to act as administrator during the entire contract period. Department staff will be available after the award to consult with the awarded Bidder in the finalization of the contract.

* 1. Payments and Other Provisions

The State anticipates paying the Contractor on the basis of net 30 payment terms, upon the receipt of an accurate and acceptable invoice. An invoice will be considered accurate and acceptable if it contains a reference to the State of Maine contract number, contains correct pricing information relative to the contract, and provides any required supporting documents, as applicable, and any other specific and agreed-upon requirements listed within the contract that results from the RFP.

**PART VII LIST OF RFP APPENDICES AND RELATED DOCUMENTS**

**Appendix A** – Proposal Cover Page

**Appendix B** – Responsible Bidder Certification

**Appendix C** – Qualifications and Experience Form

**Appendix D** – Cost Proposal Form

**Appendix E** – Submitted Questions Form

**Appendix F** – Tourism Regions Map

**APPENDIX A**

**State of Maine**

**Department of Economic and Community Development**

**PROPOSAL COVER PAGE**

**RFP# 202501015**

**Research Services**

Bidders interested in providing services for multiple research components must submit a **separate proposal** for each research component.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Bidder’s Organization Name:** | |  | | |
| **Research Component:** | | *Check one (1) of the following Research Components:*  ​☐​ Visitor Profile Research;  ​☐​ Economic Impact Analysis;  ​☐​ Marketing & Media Effectiveness Research | | |
| **Chief Executive - Name/Title:** | |  | | |
| **Tel:** |  | | **E-mail:** |  |
| **Headquarters Street Address:** | |  | | |
| **Headquarters City/State/Zip:** | |  | | |
| *(Provide information requested below if* ***different*** *from above)* | | | | |
| **Lead Point of Contact for Proposal - Name/Title:** | |  | | |
| **Tel:** |  | | **E-mail:** |  |
| **Headquarters Street Address:** | |  | | |
| **Headquarters City/State/Zip:** | |  | | |

* This proposal and the pricing structure contained herein will remain firm for a period of 180 days from the date and time of the bid opening.
* No personnel currently employed by the Department or any other State agency participated, either directly or indirectly, in any activities relating to the preparation of the Bidder’s proposal.
* No attempt has been made, or will be made, by the Bidder to induce any other person or firm to submit or not to submit a proposal.
* The above-named organization is the legal entity entering into the resulting contract with the Department if they are awarded the contract.
* The undersigned is authorized to enter contractual obligations on behalf of the above-named organization.

*To the best of my knowledge, all information provided in the enclosed proposal, both programmatic and financial, is complete and accurate at the time of submission.*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX B**

**State of Maine**

**Department of Economic and Community Development**

**RESPONSIBLE BIDDER CERTIFICATION**

**RFP# 202501015**

**Research Services**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

*By signing this document, I certify to the best of my knowledge and belief that the aforementioned organization, its principals and any subcontractors named in this proposal:*

1. *Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.*
2. *Have not within three years of submitting the proposal for this contract been convicted of or had a civil judgment rendered against them for:*
   1. *Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or contract.*
   2. *Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.*
3. *Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification.*
4. *Have not within a three (3) year period preceding this proposal had one or more federal, state, or local government transactions terminated for cause or default*.
5. *Have not entered into a prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services and this proposal is in all respects fair and without collusion or fraud. The above-mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.*
6. *Is not a foreign adversary business entity (*[*https://www.maine.gov/oit/prohibited-technologies*](https://www.maine.gov/oit/prohibited-technologies)*).*
7. *Is not on the list of prohibited companies (*[*https://www.maine.gov/oit/prohibited-technologies*](https://www.maine.gov/oit/prohibited-technologies)*) or does not obtain or purchase any information or communications technology or services included on the list of prohibited information and communications technology and services* [*https://www.maine.gov/oit/prohibited-technologies*](https://www.maine.gov/oit/prohibited-technologies) *(Title 5 §2030-B).*

|  |  |
| --- | --- |
| **Name (Print):** | **Title:** |
| **Authorized Signature:** | **Date:** |

**APPENDIX C**

**State of Maine**

**Department of Economic & Community Development**

## QUALIFICATIONS and EXPERIENCE FORM

**RFP# 202501015**

**Research Services**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |

|  |
| --- |
| **Present a brief statement of qualifications. Describe the history of the Bidder’s organization, especially regarding skills pertinent to the specific work required by the RFP and any special or unique characteristics of the organization which would make it especially qualified to perform the required work activities. You may expand this form and use additional pages to provide this information.** |
|  |

|  |
| --- |
| **Provide a description of projects that occurred within the past five (5) years which reflect experience and expertise needed in performing the functions described in Part II – Scope of Services to be Provided of the RFP. Contract history with the State of Maine, whether positive or negative, may be considered in evaluating proposals even if not provided by the Bidder.** |

|  |  |
| --- | --- |
| **Project One** | |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** | |
|  | |

|  |  |
| --- | --- |
| **Project Two** | |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** | |
|  | |

|  |  |
| --- | --- |
| **Project Three** | |
| **Client Name:** |  |
| **Client Contact Person:** |  |
| **Telephone:** |  |
| **E-Mail:** |  |
| **Brief Description of Project** | |
|  | |

**APPENDIX D**

**State of Maine**

**Department of Economic and Community Development**

**COST PROPOSAL FORM**

**RFP# 202501015**

**Research Services**

|  |  |
| --- | --- |
| **Bidder’s Organization Name:** |  |
| ***Check one (1) of the following Research Components:***  **​☐​ Visitor Profile Research;**  **​☐​ Economic Impact Analysis;**  **​☐​ Marketing & Media Effectiveness Research** | |
| **Proposed Cost** | **$** |

Bidders must submit a cost proposal that includes the costs necessary for the Bidder to fully comply with the contract terms, conditions, and RFP requirements. The proposed cost must be presented as a fixed amount.

The fixed amount will be used to score the cost proposal as defined in Part V, B, 3 of the RFP.

Instructions: Cost should reflect completion of all work for each calendar year. Explain the assumptions used in calculating costs for each research project. Project costs musts include the following:

* Design and Implementation
* Data Collection
* Data Processing
* Analysis and Reporting
* Final Report and Presentation to the Department and Maine tourism industry
* Include any anticipated out-of-pocket costs such as personnel time and travel expenses (for “in-person” presentations in Maine) to complete each research project.

Proposed budgets in sections 1, 2, and 3 below **must be inclusive of all costs**. Bidders are to provide a budget narrative to describe how the budget figures below were determined.

|  |  |  |
| --- | --- | --- |
|  | **PROPOSED BUDGETS** | **Total Cost** |
| **1.** | **Visitor Profile Research - Proposed Budget**  **Visitor Profile Research**   * Winter season * Spring/Summer season * Fall season * Annual Report for Calendar Year * Eight Tourism Region Reports for Calendar Year   **Visitor Profile Research – National Level**   * Calendar Year   **First-Time vs. Repeat Visitor Report**   * Calendar Year   **Canadian Report**   * Calendar Year | **$** |
| **2.** | **Economic Impact Research - Proposed Budget**   * Calendar Year Statewide * Calendar Year for each of the eight regions | **$** |
| **3.** | **Marketing & Media Effectiveness Study – Proposed Budget**   * Winter Study * Spring/Summer Study * Fall Study * Year-end Summary Report | **$** |

**APPENDIX D**

**COST PROPOSAL FORM, cont.**

**BUDGET NARRATIVE**

**(Use additional pages as needed)**

**APPENDIX E**

**State of Maine**

**Department of Economic and Community Development**

**SUBMITTED QUESTIONS FORM**

**RFP# 202501015**

**Research Services**

This form should be used by Bidders when submitting written questions to the RFP Coordinator as defined in Part III of the RFP.

If a question is not related to any section of the RFP, enter “N/A” under the RFP Section & Page Number. Add additional rows as necessary.

|  |  |
| --- | --- |
| **Organization Name:** |  |

|  |  |
| --- | --- |
| **RFP Section & Page Number** | **Question** |
|  |  |
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**APPENDIX F**

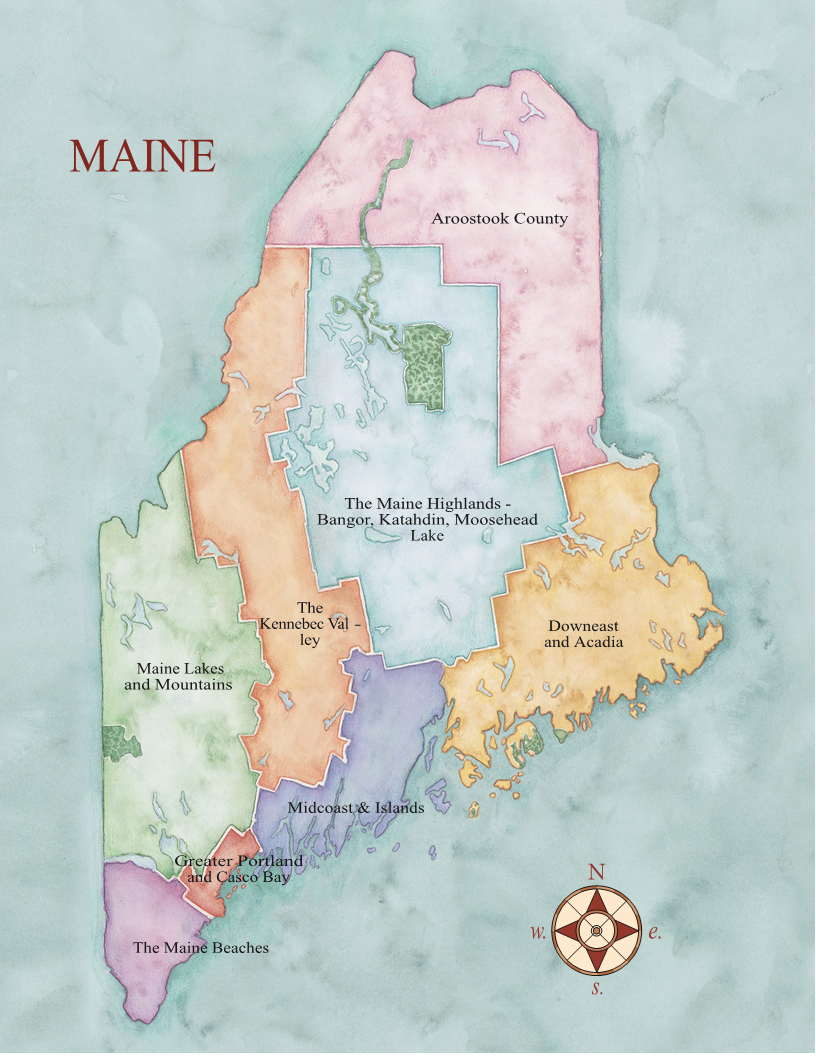
**State of Maine**

**Department of Economic and Community Development**

**Maine Tourist Regions Map**

**RFP# 202501015**

**Research Services**

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