Finance Authority of Maine (FAME)

Student Loan Repayment Tax Credit (SLRTC) Marketing RFP REVISED

RFP Coordinator	*All communication regarding the RFP must be made through the RFP Coordinator identified below*. **Contact:** wnorbert@famemaine.com
Proposal Submission	*Proposals must be received by the RFP Coordinator by:* **Date:** 11/30/2026 no later than 5:00PM EDT *All components must be submitted electronically to the following address:* **Electronic (e-mail) Submission Address:** wnorbert@famemaine.com

TABLE OF CONTENTS

PUBLIC NOTICE 2

PART I INTRODUCTION 3
A. Purpose and Background 3
B. General Provisions 3

PART II SCOPE OF SERVICES 5

PART III PROPOSAL CONTENT 6
Section 1: Organization Qualifications and Experience 6
Section 2: Project Details 7

PART IV PROPOSAL EVALUATION 9
A. Evaluation Process - General Information 9
B. Evaluation Process – Details 9
C. Selection and Award 11

PART V KEY DATES FOR RFP 12
A. Table of Key Dates 12

PART VI PROPOSAL SUBMISSION PACKAGE 13

PART VII CONTRACT ADMINISTRATION AND CONDITIONS 14

PART VIII RFP APPENDICES AND RELATED DOCUMENTS 15
APPENDIX A 16
APPENDIX B 18
APPENDIX C 20

PUBLIC NOTICE

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Finance Authority of Maine
Student Loan Repayment Tax Credit Marketing RFP

The Finance Authority of Maine (FAME) is seeking proposals from interested and qualified parties to market Maine's Student Loan Repayment Tax Credit statewide to potentially eligible audiences, including remote workers, employers, high schools, post-secondary educational institutions, organizations of parents, teachers, and others. Marketing efforts can include printed and/or electronic materials, online information, and in-person and remote promotional efforts. Per statute, only private nonprofit corporations are eligible for the contract.

A copy of the RFP, any relevant documents and all amendments related to the RFP, can be obtained at: Requests for Proposals Archives - FAME Maine.

Proposals must be submitted to the RFP Coordinator, via e-mail, at:
wnorbert@famemaine.com
.

Proposal submissions must be received no later than **5:00PM EDT on November 30, 2026**.

Proposals not submitted to the RFP Coordinator's e-mail address by this deadline will not be considered for the contract award.

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Finance Authority of Maine (FAME)
Student Loan Repayment Tax Credit Marketing RFP

PART I INTRODUCTION

A. Purpose and Background

Established in 1983, the **Finance Authority of Maine (FAME)** is a quasi-independent state agency dedicated to improving Maine's economic landscape by expanding access to capital for businesses and increasing opportunities for educational advancement. FAME serves the people of Maine through a broad range of financial programs designed to drive business growth and educational attainment. Additional details about our programs and services can be found at http://www.famemaine.com.

One-year contract in the amount of **$73,000** to be awarded in one installment by the Finance Authority of Maine (FAME) to help market the Student Loan Repayment Tax Credit. Per statute, only private nonprofit corporations are eligible for the contract. Vendor will be expected to use all funds to help market the program and/or reimburse costs for so doing. Vendor must report annually in writing to FAME on specific actions taken, expenses incurred, and outcomes achieved in promoting awareness of the tax credit.

The 126th Maine Legislature enacted PL 2013, Ch. 417, which directed FAME to contract with a private nonprofit corporation annually to market the *Job Creation Through Educational Opportunity Program* throughout the state. The program was subsequently amended by the 130th Maine Legislature to simplify its terms and to increase marketing funds. It is now known as the **Student Loan Repayment Tax Credit**. More information on the program may be found at 20-A M.R.S.A. § 12541 et seq.; 36 M.R.S.A. § 5217-E et seq; and at Student Loan Repayment Tax Credit | Maine Revenue Services

B. General Provisions

1. From the time the RFP is issued until award notification is made, all contact with FAME regarding the RFP must be made via email through the RFP Coordinator. No other person/ FAME employee is empowered to make binding statements regarding the RFP. Violation of this provision may lead to disqualification from the bidding process, at FAME's discretion.
2. Issuance of the RFP does not commit FAME 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 to all written supplements and amendments (such as the Summary of Questions and Answers) issued by FAME. 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, FAME will consider materials provided in the proposal, information obtained through

interviews/presentations (if any), and internal FAME information regarding previous contract history with the Bidder (if any). FAME 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 FAME.
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 et seq.).
8. FAME, at its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to the RFP.
9. Taxation and Compliance: FAME's purchase of goods and services is exempt from state, federal, and local sales and use taxes. The successful Respondent agrees to comply with all applicable federal, state, and local statutes, laws, and regulations in the performance of the Contract.
10. All applicable laws, whether or not herein contained, are incorporated by reference. It is the Bidder's responsibility to determine the applicability and requirements of any such laws and to abide by them.

PART II SCOPE OF SERVICES

Overview

The selected vendor will be expected to help market the tax credit statewide for a one-year period to potentially eligible and/or relevant audiences, including remote workers, employers, high schools, postsecondary educational institutions, organizations of parents, teachers, and others. Marketing efforts can include printed and/or electronic materials, online information, and in-person and remote promotional efforts. The vendor must submit an annual report to FAME detailing their efforts and experiences in promoting awareness of the credit, including itemized expenses incurred.

PART III PROPOSAL CONTENT

This section contains specific instructions for Bidders to use in preparing their proposals. FAME seeks **detailed yet succinct** responses that demonstrate the Bidder's proposed solution, qualifications, experience, and ability to deliver the desired outcome defined in this RFP.

The Bidder's proposal must follow the outline used below, including the Sections and sub-sections. Failure to use the outline specified in PART III, Proposal Submission Package requirements defined in PART VI, 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. Responses to any section as N/A or not applicable without specific explanation may result in a determination that a section or subsection was not adequately answered.

FAME and its evaluation team have sole discretion to determine whether a variance from the RFP specifications may result in disqualification or reduction in scoring of a proposal. Re-phrasing of the content provided in the RFP will, at best, be considered minimally responsive.

Please respond to the below questions and limit responses to these four questions to **no more than 1,000 words** total:

1. How does your organization propose to utilize the requested funds?
2. What makes your organization the best choice to administer the contract?
3. What thoughts do you have to help better publicize awareness of the tax credit?
4. Is your organization willing and able to comply with the above and below terms of the contract, including submitting timely and accurate reports, a detailed budget of expenses incurred, and recitation of efforts made to promote the credit, and, if necessary, appearing before the Maine Legislature to respond to questions about the program and your marketing efforts?

Section 1: Organization Qualifications and Experience

Bidder Qualifications

Bidders shall provide background information on their company (in PDF format), with a specific focus on their qualifications to undertake this engagement.

Examples of the content that would be in this section include:

- Company overview – Size, number of years in business, primary industries served, leadership team.
- Capabilities – Overall service catalogue/offerings. Details on services/capabilities that are relevant to this engagement. If applicable, please include information on any capabilities that would likely be relevant in the implementation of a roadmap.
- Partnerships and Certifications that are relevant to this engagement.

Qualifications and Experience

Some of the key qualifications FAME is seeking include:

Qualification & Experience Requirements

- Marketing experience, including to Maine employers and postsecondary students and institutions.

- Knowledge of the Student Loan Repayment Tax Credit, including potential utilizers and interested parties.
- Familiarity with Maine's workforce challenges, including the role of student debt and the potential for student loan debt repayment to incentive individuals to live and work in the state.
- Per statute, only private nonprofit corporations are eligible for the contract.

Section 2: Project Details

This section of the submission represents the bidder's approach to the project. It is important that the bidder clearly articulates the rationale behind the approach, the timeline and phases, the deliverables that will be created, and clearly sets expectations of what will be required from FAME to complete the project.

Please refer to **Part II: Scope of Services** for scope details.

The topics provided below are descriptive of the information FAME is looking for from each bidder and will be tied back to evaluation criteria used by the evaluation team.

Each bidder is welcome to develop their response in their preferred proposal/storytelling format but is encouraged to make sure the topics below are clearly addressed.

Understanding of Engagement
Please describe your understanding of the objectives of the project and provide any insights you have gained from reviewing the RFP and the artifacts provided.

Scope Alignment
Bidders should indicate their ability to deliver all aspects of the project and identify if/where they would need to partner with another organization to satisfy the requirement.

Approach
Describe your proposed approach and methodology for delivering the project. Outline the key phases, activities, and/or milestones involved in the project. Highlight any specific frameworks, tools, or best practices you will employ.

Deliverables
Bidders should provide a detailed list of the deliverables you will provide throughout the engagement. The following information should be provided for all deliverables:
- Deliverable Name
- Deliverable Description and how it supports project objectives
- When Deliverable will be drafted, reviewed, and finalized
- Sample of deliverable

Timeline
Present a project timeline that outlines any major phases, milestones, and dependencies for this engagement. Indicate the estimated duration for each phase and key deliverables that will be produced. Explain how you will manage and communicate progress throughout the engagement.

Team
FAME is requesting several pieces of content regarding the team:

- The organizational structure covering the bidder's relationship and delivery teams for FAME.
- Organizational structure representing the bidder's internal management structure responsible for supporting the delivery team and for FAME executive engagement.
- Proposed organizational structure for the project inclusive of bidder and FAME resources.
- Profiles for the "key resources" that will deliver the engagement and the role and responsibility they will fulfill on the team.
- If applicable, mention any subcontractors or partners you will engage and their specific contributions to the project.
- For those bidders that make the finalist presentation, it is expected that the "key resources" will participate in the finalist presentation to represent their role, responsibility, and understanding of the project.

Support Required from FAME
Specify the support and time commitment you require from our organization to ensure the success of the engagement. This may include access to key stakeholders, subject matter experts (SME), or decision makers. Clearly outline your assumptions regarding FAME's internal roles, responsibilities and expected level of participation. Due to FAME's size there are a limited number of SMEs available to support engagements who will only be available on a part-time basis. The more specific the bidder can be regarding when the support will be needed based on the activity/phase/deliverable/etc., the better.

Assumptions
List any assumptions you have made in preparing your proposal. This may include assumptions related to the scope, timeline, deliverables, milestones, resources, constraints, and third-party requirements in the project.

Cost Proposal Form Instructions
Bidders must fill out **Appendix C** (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 the exclusion of the proposal from consideration, at the discretion of FAME.

PART IV PROPOSAL EVALUATION

Evaluation of the submitted proposals will be accomplished as follows:

A. Evaluation Process - General Information

1. An evaluation team (the "FAME Review Team") 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 Finance Authority of Maine.
3. FAME reserves the right to communicate and/or schedule interviews/presentations with Bidders, if needed, to obtain clarification of information contained in the proposals received. FAME 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 interview/presentation process and, therefore, Bidders must submit proposals that present their costs and other requested information as clearly and completely as possible.

B. Evaluation Process – Details

1. **Evaluation Process:** The Evaluation Process will consist of three distinct parts:

    a. Proposal Evaluation. The FAME review team will evaluate each submitted response against the Evaluation Criteria defined in the Evaluation Criteria and Scoring section below using a **consensus** approach to evaluate and score each section. Members of the evaluation team will not score those sections individually, instead they will arrive at a consensus decision as to assignment of points for each section. The cost proposal will be scored as described below.

2. **Evaluation Criteria:** Bidder responses will be evaluated on the following scale that will measure the degree to which each proposal meets the following criteria:

Evaluation Criteria		
Criteria	**Definition**	**Score**
Qualifications and Experience	Bidder background, relevant experience with similar small-to-medium size public sector project work, and demonstrated success with engagements of this nature. Per statute, only private nonprofit corporations are eligible for the contract.	25
Completeness	Completeness and competitiveness of proposal considering limited budget, clear value proposition, and alignment with budget constraints	25
Solution Applicability	Quality and appropriateness of proposed solutions, applicable cybersecurity controls, and alignment with FAME's vision	20
Project Timeline, Communications, and Management	Realistic project timeline with clear milestones, effective communication, and risk management strategies	15
Approach and Methodology	Clarity and practicality of proposed implementation approach, alignment with FAME's operational capabilities, and demonstrated methodology for collaborative scope refinement	15
Total Scoring		
	Total Score	**100**

3. **Scoring the Cost Proposal:** See **Appendix C: Cost Proposal Form** for additional details on Cost Proposal structure.

   No Best and Final Offers: The Finance Authority 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.

4. **Negotiations:** FAME reserves the right to negotiate with the awarded Bidder to finalize a contract. Such negotiations may vary the content, nature or requirements of the proposal or FAME's Request for Proposal to an extent that may affect the price of goods or services requested. **FAME 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 has not been negotiated with the highest ranked Bidder within 60 calendar days, or longer if mutually agreed upon in writing by the parties, FAME may withdraw its award and negotiate with the next-highest ranked Bidder, and so on, until an acceptable contract has been finalized. Alternatively, FAME may cancel the RFP, at its sole discretion.

C. Selection and Award

1. The final decision regarding the award of the contract will be made by the Chief Executive Officer of FAME.
2. Notification of conditional award selection or non-selection will be made in writing by FAME.
3. Issuance of the RFP in **no way** constitutes a commitment by FAME 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. FAME reserves the right to reject any and all proposals or to make multiple awards in whole or in part.
5. FAME reserves the right to terminate or advance the contract without penalty in the event of a court action challenging the award within 30 days of the contract date.

PART V KEY DATES for RFP

A. Table of Key Dates

Activity	Date
RFP Release	Monday, November 2, 2026.
Proposal submission deadline	**Monday, November 30, 2026. 5pm EDT.**
Anticipated Award Date	Friday, December 11, 2026
Anticipated Project Launch	Early January 2027

Note: Items in **bold** are bidder deliverable dates.

PART VI PROPOSAL SUBMISSION PACKAGE

Proposals Due: Proposals must be **received** via email no later than 5pm EDT, on **Monday, November 30, 2026**, as listed in the table above**. E-mails containing proposal content received after the deadline will be disqualified from consideration.** Bidders will receive an email confirmation when their emails are delivered and content has been successfully accessed by FAME.

Delivery Instructions: E-mail proposal submissions are to be submitted to the RFP Coordinator at wnorbert@famemaine.com.

1. **Only proposal submissions received by e-mail will be considered.** FAME assumes no liability for assuring accurate/complete e-mail transmission and receipt.
2. **E-mails containing links to file sharing sites or online file repositories will not be accepted as submissions**. All files must be attached to the e-mail.
3. **Encrypted e-mails received which require opening attachments and logging into a proprietary system will not be accepted as submissions**. Please check with your organization's Information Technology team to ensure that your security settings will not encrypt your proposal submission.
4. Bidder's proposal submissions are to be broken down into multiple files, with each file named as it is titled **in bold** below. ZIP files may be utilized so long as ZIP file meets naming convention.

   File 1 [Bidder's Name] – Vendor Certification - *PDF format for content preferred.*

   Content:
   - Appendix A (Vendor Certification Form)
   - Litigation content
   - Certificate of Insurance

   File 2 [Bidder's Name] – Reference Form – *PDF format preferred.*

   Content:
   - Appendix B (Reference Form)
   - Case Study attachments

   File 3 [Bidder's Name] – Proposal Content – *PDF format preferred.*

   Content:
   - Appendix C (Scope Alignment Table)
   - Information outlined in PART III PROPOSAL CONTENT.

   File 4 [Bidder's Name] – Cost Proposal – *PDF format or XLS preferred.*

   Content:
   - Appendix D (Cost Proposal Form)

5. **File size limits are 25MB per e-mail.** Bidders may split content across multiple e-mails, if necessary, due to file size concerns. Where content needs to be split over multiple emails bidder should append **"E-Mail 1 of [X]"** on the email Subject line.

PART VII CONTRACT ADMINISTRATION AND CONDITIONS

1. The awarded Bidder will be required to execute a contract in form and content acceptable to FAME.

2. Allocation of funds is final upon successful negotiation and execution of the contract, subject to the review and approval of FAME's Chief Executive Officer. FAME 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 FAME's Chief Executive Officer. Any appeals to FAME award decision(s) may further postpone the actual contract effective date, depending upon the outcome. **The contract effective dates listed in the RFP may need to be adjusted, if necessary, to comply with Authority requirements.**

3. In providing services and performing under the contract, the awarded Bidder must act as an independent contractor and not as an agent of FAME.

4. FAME reserves the right to terminate or advance the contract without penalty in the event of a court action challenging the award within 30 days of the contract date.

PART VIII RFP APPENDICES AND RELATED DOCUMENTS

Appendix A – Vendor Certification Form

Appendix B – Reference Form

Appendix C – Cost Proposal Form

APPENDIX A

Finance Authority of Maine (FAME)
VENDOR CERTIFICATION
Student Loan Repayment Tax Credit Marketing RFP

Bidder Contact Information:

Bidder's Organization Name:			
Authorized Executive - Name/Title:			
Tel:		**E-mail:**	
Headquarters Street Address:			
Headquarters City/State/Zip:			
(Provide information requested below if different from above)			
Point of Contact for Proposal - Name/Title:			
Tel:		**E-mail:**	

Subcontracting Partner Information (if applicable):

Subcontracting Partner:			
Authorized Executive - Name/Title:			
Tel:		**E-mail:**	
Headquarters Street Address:			
Headquarters City/State/Zip:			
Role / Qualifications of Subcontractor			
Brief description of the subcontractors' organizational capacity and qualifications.			

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. In cases where disclosure of such details is prohibited, the Bidder must provide notice of the existence and number of such matters with as much detail as requested by FAME and as permitted by applicable law and existing agreements.

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.

Acknowledgements:

- This proposal and the pricing structure contained herein will remain firm for a period of 180 days from the date and time of this submission.
- No personnel currently employed by FAME, 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 FAME if they are awarded the contract.
- The undersigned is authorized to enter into contractual obligations on behalf of the above-named organization.

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

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

***APPENDIX* B**

Finance Authority of Maine (FAME)
REFERENCE FORM
Student Loan Repayment Tax Credit RFP

Provide a description of 3 – 5 projects that occurred within the past five years which reflect experience and expertise needed in performing the functions described in the "Scope of Services" portion of the RFP.

For each of the project examples provided, a contact person from the client organization involved should be listed, along with that person's telephone number and e-mail address.

Please note that contract history with FAME and the State of Maine, whether positive or negative, may be considered in rating proposals even if not provided by the Bidder.

FAME will only contact references for vendors that are invited to Finalist Presentations (if applicable) and will work with vendors to schedule calls.

Bidder's Organization Name:	

Project Name	
Client Name:	
Contact Person/Title:	
Telephone:	
E-Mail:	

Description and Relevance of Project

For each of the 3 – 5 projects referenced bidders should include:

1. *Project Name and Contact info requested above.*
2. *A narrative that explains the relevance of this project to FAME's program.*
3. *A Case Study that summarizes the scope, approach, technologies, and business impact of the engagement being referenced.*

The Case Study can be provided as additional attachments to this section of the response.

Project Name	
Client Name:	
Contact Person/Title:	
Telephone:	
E-Mail:	

Description and Relevance of Project

For each of the 3 – 5 projects referenced bidders should include:

1. *Project Name and Contact info requested above.*
2. *A narrative that explains the relevance of this project to FAME's program.*
3. *A Case Study that summarizes the scope, approach, technologies, and business impact of the engagement being referenced.*

The Case Study can be provided as additional attachments to this section of the response.

Project Name	
Client Name:	
Contact Person/Title:	
Telephone:	
E-Mail:	

Description and Relevance of Project

For each of the 3 – 5 projects referenced bidders should include:

1. *Project Name and Contact info requested above.*
2. *A narrative that explains the relevance of this project to FAME's program.*
3. *A Case Study that summarizes the scope, approach, technologies, and business impact of the engagement being referenced.*

The Case Study can be provided as additional attachments to this section of the response.

Project Name	
Client Name:	
Contact Person/Title:	
Telephone:	
E-Mail:	

Description and Relevance of Project

For each of the 3 – 5 projects referenced bidders should include:

1. *Project Name and Contact info requested above.*
2. *A narrative that explains the relevance of this project to FAME's program.*
3. *A Case Study that summarizes the scope, approach, technologies, and business impact of the engagement being referenced.*

The Case Study can be provided as additional attachments to this section of the response.

APPENDIX C

Finance Authority of Maine (FAME)
COST PROPOSAL
Student Loan Repayment Tax Credit Marketing RFP

Bidder's Organization Name:	
Total Proposed Cost ($73,000 maximum):	**$**
Cost Breakdown (Bidders are required to clearly address costs for the entirety of the project. If the project contains phases, provide a breakdown of the costs and assumptions organized by phase):	