

CITY OF BOSTON
OFFICE OF ECONOMIC DEVELOPMENT



REQUEST FOR PROPOSALS (RFP)

DISPARITY STUDY

Sealed proposals must be filed at:

City of Boston
Office of Economic Development
City Hall, Room 603
Boston City Hall
One City Hall Plaza
Boston, MA 02201

Proposal Deadline: 12 o'clock noon, Friday, November 3, 2017

NO LATE PROPOSALS WILL BE ACCEPTED

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ADVERTISEMENT

**CITY OF BOSTON
MAYOR'S OFFICE OF ECONOMIC DEVELOPMENT**

REQUEST FOR PROPOSALS TO PROVIDE THE FOLLOWING SERVICES AND/OR SUPPLIES:

Requesting proposals from a qualified consultant or team of consultants to provide technical and administrative support for the development of a Disparity Study for the City of Boston. The specifics are more particularly described in the Request for Proposals (RFP).

The City of Boston Office of Economic Development is seeking a consultant to assist the City in designing and conducting a Disparity Study. The requested services shall be completed across two project phases, described in the RFP. If the City decides to proceed with the second phase of the Disparity Study, the requested services will include extensive data analysis and the completion of a final and complete Disparity Study report.

The Request for Proposal (RFP) will be made available **on Monday, October 9, 2017** on the City's purchasing website and Supplier Portal, www.cityofboston.gov/procurement, and will be available until the proposal deadline.

Written questions shall be received no later than **12:00 P.M. (noon) on Monday, October 16**. Answers to written questions will be provided on **Thursday, October 19, 2017**.

A Proposers' Conference will be held on **Wednesday, October 25, at 2:30 P.M.** in the BPDA Board Room on the 9th floor of Boston City Hall. All interested parties may attend the Proposers' Conference.

Completed proposals must be submitted no later than **12:00 P.M. (noon) Friday, November 3, 2017**. All applicants will be notified of funding decisions by **Friday, November 17, 2017** for Phase I start-up **Monday, November 27, 2017**.

The City reserves the right to reject any and all bids, or any part or parts thereof, and to issue a contract as the Official deems to be in the best interests of the City. This contract/ award shall be subject to the availability of an appropriation therefore. If sufficient funds are not appropriated for the contract/award in any fiscal year, the Official may cancel the contract.

The issuing of this contract/award shall be subject to the approval of the Mayor of Boston. Please contact Krista Zalatores, Chief of Staff at 617-635-5723 or via email krista.zalatores@boston.gov for further information. The City of Boston is an EO/AA Employer. The City of Boston affirmatively ensures that Disadvantaged Business Enterprises (DBE), Small Local Business Enterprise (SLBE), Minority Business Enterprise (MBE), Women Business Enterprise (WBE), and Veteran Owned Small Business Enterprise (VOSBE) firms shall be afforded full opportunity to submit qualifications in response to this and will not be discriminated against on the basis of race, color, national origin, ancestry, disability, gender, transgender status, political affiliation, age, sexual orientation or religion in any consideration leading to the award of contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise subjected to discrimination in any consideration leading to the award of a contract.

1. Key Dates and Deadlines

RFP Available: Monday, October 9, 2017

Written Questions Due: Monday, October 16, 2017

Answers to Written Questions: Thursday, October 19, 2017

Proposers' Conference: Wednesday, October 25, 2017

Deadline for Proposals: Friday, November 3, 2017

Funding Decision: Friday, November 17, 2017

2. Proposal Information, Process and Conditions

1. Introduction

The City of Boston (the “City”), acting through the Chief of Economic Development (the “Official”), requests proposals from qualified contractors to assist the City in designing and conducting a Disparity Study or Studies. The project will proceed in two phases. In Phase I, the consultant will conduct a Utilization Scan to identify data sources relevant to the overall study. Based on these findings, the consultant will advise the City on designing a disparity study to address one or more of the following areas of focus:

- a) the extent to which a disparity exists between the availability of qualified Minority and Women-owned Business Enterprises (“MWBEs”) and their actual utilization as contractors and subcontractors on City contracts;
- b) the extent to which a disparity exists between the availability of qualified female and minority workers and their actual hours of employment on City construction projects and on large City-assisted construction projects;
- c) the procurement of Construction, Professional Services (including Finance, Architecture and Engineering), Standard Services, and Goods for the City;
- d) the subcontracting practices of prime contractors/vendors who do business with the City and other related agencies;
- e) minority and women-owned business participation in the private sector; and
- f) whether race- and gender-conscious remedies concerning the use of MWBEs on City contracts and female and minority workers on City construction projects and large City-assisted construction projects are legally sound, and, if so, what specific remedies may be used.

At the conclusion of Phase I, the City will determine in its sole discretion whether to proceed with Phase II.

If the City decides to proceed within Phase II, a disparity study will be conducted according to the design and area of focus chosen by the City upon conclusion of Phase I.

The City will procure these services pursuant to M.G. L. Chapter 30B, section 6.

Any supplemental instructions, amendments, or changes to the RFP shall be in the form of written addenda to this RFP. If issued, such addenda shall be emailed to all firms on record as having downloaded or otherwise received the RFP. Such addenda, if any, will be sent no later than five (5) days prior to the deadline for the submission of proposals.

Failure of any Offeror to acknowledge receipt of any such addenda shall not relieve such Offeror from any obligation under the proposal as submitted. At the time of the opening of proposals, each Offeror shall be conclusively presumed to have received and understood all RFP documents, including all addenda, and the failure of any Offeror to examine any form, instrument, or other document which is part of the RFP shall in no way relieve such Offeror from any obligation arising under law from the submission of a proposal.

2. Submittal Process for Proposals

The complete RFP response involves a number of subsections, but the two main sections are a **Technical Proposal** and a **Price Proposal**.

In the Technical Proposal, the Offeror presents its experience and approach in response to the project requirements set out in this RFP. The Technical Proposal will be in large part based on the response to the Scope of Services in Section 4.1 and will include all information requested in the RFP except for prices or costs.

The Price Proposal must be submitted separately from the Technical Proposal pursuant to statute. **This is critically important.** The Evaluator or Evaluation Committee will complete its evaluation of the Technical Proposals prior to reviewing the Price Proposals.

Offerors must submit proposals by delivery of two (2) separate sealed envelopes, one containing the Technical Proposal and the other containing the Price Proposal. Under no circumstance shall any price information be included with a Technical Proposal. The inclusion of a Price Proposal or other pricing information in the same envelope as a Technical Proposal may result in the immediate disqualification of the RFP response.

All proposals must be received no later than **12:00 pm (noon) on Friday, November 3, 2017**. **NOTE:** Technical or Price Proposals or any parts thereof received by the Official after the time and date stated above will be rejected as non-responsive to the RFP. Delivery of proposals to any office or location other than the location specified below will not constitute receipt by the City. It is the sole responsibility of Offerors to ensure that Technical and Price Proposals are received at the proper location, prior to the stated deadline. Offerors should plan accordingly for timely delivery. Faxed or emailed proposals will not be accepted.

The City accepts no financial responsibility for costs incurred by any Offeror in responding to this RFP. All responses and materials related to this RFP will become the property of the City upon submission.

1. Technical Proposal:

Technical Proposals must not contain any reference to price. The inclusion of pricing data in a Technical Proposal may result in the immediate disqualification of the Offeror's proposal.

The complete original Technical Proposal and four copies as well as one electronic copy on a thumb drive or CD must be submitted in a separate sealed envelope and clearly marked as follows:

City of Boston
DISPARITY STUDY RFP

TECHNICAL PROPOSAL
Submitted by: (Name of Offeror)

and delivered or mailed to:

Krista Zalatores
City of Boston
Office of Economic Development
City Hall, Room 603
Boston City Hall
One City Hall Plaza
Boston, MA 02201

All Proposals must be received no later than **12:00 pm (noon) on Friday, November 3, 2017**

2. Price Proposal:

The Price Proposal must conform to the format and requested information detailed in Appendix B Price Form and must be submitted **separately** from the Technical Proposal in a separate sealed envelope.

Fixed Pricing

The price must be stated as a fixed, not to exceed total price for the services and deliverables described in the Scope of Services, Section 4.1, with the underlying hourly rates per position included for informational purposes only to inform the City of the level of effort the Contractor expects for the project.

Hourly Rates

If the City elects to obtain additional consulting services, at its sole discretion, the selected Offeror shall be available for such additional services directly related to this RFP, at the hourly rates provided in response to this RFP, and pursuant to a contract amendment, additional statement of work, or purchase order, as applicable and as permitted by law.

No additional charges, including travel and other expenses, will be allowed.

Any taxes due will be assumed to be included in the Offeror's price of services. The City is exempt from federal excise taxes (Federal Exemption No. A-108-328) and from Massachusetts sales and use taxes (Certificate No. E-046-001-380). Exemption certificates will be provided, if requested, following award to the successful Offeror.

The complete original Price Proposal and four copies as well as one electronic copy on a thumb drive or CD must be submitted in a separate sealed envelope and clearly marked:

City of Boston
DISPARITY STUDY RFP

PRICE PROPOSAL

Submitted by: (Name of Offeror)

and delivered or mailed to:

Krista Zalatores
City of Boston
Office of Economic Development
City Hall, Room 603
Boston City Hall
One City Hall Plaza
Boston, MA 02201

All Proposals must be received no later than on **12:00 pm (noon) on Friday, November 3, 2017**

3. Required Format and Proposal Checklist

Proposals shall contain all completed forms per this RFP. Excluding Appendix items, the proposal will not exceed 50 pages.

1. Proposal Response Checklist

The items in this section constitute the Offeror's total proposal:

- Cover Letter
- Offeror Profile
- Technical Proposal in response to the Scope of Services (other than the Pricing Proposal, include all documents in the Technical Proposal envelope)
- City of Boston Standard Contract Forms
- Pricing Proposal

Cover Letter

A cover letter signed by the Offeror's authorized representative shall accompany the proposal. The letter shall contain the name and address of the corporation or business organization submitting the proposal,

and the name, address, telephone number, and title of the Offeror's authorized representative. The letter may include a brief introduction and executive summary of the proposal. Submission of the letter will constitute a representation by your company that your company is willing and able to perform the commitments contained in the proposal. Include in the Technical Proposal envelope.

Offeror Profile

This section constitutes a general description of the business and experience of the Offeror as well as references per Section 6 of the RFP. Include in the Technical Proposal envelope.

Technical Proposal in Response to the Scope of Services

This section constitutes the Offeror's description of its approach/methodology to the Scope of Services, Section 4.1, specific resources and project work plan for this engagement, including personnel, and a description of the specific methodology your firm will utilize to complete the Scope of Services, and any unique and particularized capabilities that the Offeror brings to the project that will provide expert guidance to the City with respect to municipal executive compensation. Include a projected timeline and a description of each step along the timeline. Past examples of similar successful projects are encouraged. This section is a critical component of the proposal and should include a detailed description of the Offeror's work plan and project organization and should be tied to the comparative evaluation criteria in this RFP, Section 5.2. Include in the Technical Proposal envelope.

City of Boston Standard Contract Forms and Minimum Qualifications

The Offeror will fully complete the forms as listed in Appendix A, Standard Contract Forms, and return the signed forms with the proposal. The Offeror may complete other standard forms upon contract award. The Offeror must also complete the Minimum Qualifications checklist in Appendix C. Include in the Technical Proposal envelope.

Pricing Proposal

The Price Proposal must provide the level of detail requested on the forms provided and must be signed by an authorized official of the Offeror. Reminder: **This section is to be submitted with the Price Proposal only.** Under no circumstances shall any price information be included in the Technical Proposal. Include in the Pricing Proposal envelope.

4. Prime Contractor

The Offeror will be the prime vendor with ultimate responsibility for the services and deliverables. Whenever a proposal includes a reference to subcontracted services to be furnished by an entity other than the Offeror, sufficient information regarding such subcontracted service shall be included to permit evaluation of the proposal as a whole, and delineated in sufficient detail to guide the understanding and evaluation of such subcontracted components and services. In particular, it is anticipated that the successful Offeror may address the need to bring sufficient legal expertise to the study design by subcontracting with a law firm.

The Offeror will be required to assume responsibility for all items and services offered in its proposal, whether or not they produce or furnish them. Further, the City will consider the Offeror to be the sole

point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

Any subcontractors and outside associates or consultants required by the Offeror in connection with the services covered by this contract shall be limited to such individuals or firms as were specifically identified and agreed to as part of the proposal. Any addition to or substitution of such subcontractors, associates, or consultants shall be subject to prior written approval of the Official.

5. Proposal Evaluation and Acceptance

Proposals remain sealed until such time as designated for opening.

Technical proposals will be opened in the presence of one or more witnesses at the time and date specified. A register of proposals, with the name of each Offeror and the number of modifications to the proposal, if any, will be available for public inspection following the opening of Technical Proposals. However, the contents of the proposals shall remain confidential until the completion of the City's evaluations, or until the time for acceptance specified in the RFP, whichever is earlier. Thereafter, all proposals will be public records. Do not submit any confidential information as part of your proposal.

An Evaluator or Evaluation Committee appointed by the Official shall be provided with Technical Proposals in closed session. The Evaluator or Committee will examine each proposal to determine whether it meets all of the proposal submission requirements. A "responsive" proposal is one that contains all of the forms and information, and offers all of the equipment, supplies, or services requested in the RFP. A "responsible" proposal is one that demonstrates the capability, integrity, and reliability of the Offeror to perform under the contract to be awarded. **Any proposal which fails to include all of the information or documentation specified in the proposal submission requirements is non-responsive and may be rejected.**

The Evaluator or Evaluation Committee may contact client references to assess the Offeror's performance and responsibility, and to assess and validate the client's satisfaction with the Offeror's services. The City reserves the right to contact additional references or otherwise investigate Offeror's performance in past projects to further assess its responsiveness and responsibility.

Based upon the results of the evaluation, the City may in its discretion, identify individual Offerors to participate in onsite presentations and interviews. Such Offerors will be notified in advance in writing of the date and time for presentations and interviews, if any.

The Evaluator or Evaluation Committee will evaluate the Offeror's responses as they relate to the requirements of the RFP. The Evaluator or Committee will evaluate the proposals and make recommendations to the Official.

The Official will open and evaluate the Price Proposals so as to avoid disclosure to the individuals evaluating the technical/non-price proposals until such evaluations are complete.

6. Correction, Modification, and Withdrawal of Proposals

The Official shall unconditionally accept a proposal without alteration or correction, except as provided in this paragraph. An Offeror may correct, modify, or withdraw a proposal by written notice received in the office designated in the RFP prior to the time and date set for the submission of proposals. If a mistake in a proposal is clearly evident on the face of the proposal document, the Official shall correct the mistake to reflect the intended correct proposal and so notify the Offeror in writing, and the Offeror may not withdraw the proposal. An Offeror may withdraw a proposal if a mistake is clearly evident on the face of the proposal document, but the intended correct proposal is not similarly evident. After the opening of Technical Proposals, an Offeror may not change the price or any other provision of the proposal in a manner prejudicial to the interests of the City or fair competition. The Official shall waive minor informalities or allow the Offeror to correct them.

7. Acceptance of the Proposal

The proposal will be firm for one hundred twenty (120) calendar days after the deadline for submission of proposals. The submission of a proposal shall constitute agreement on the part of the Offeror that, if the Offeror is given or mailed a notice of acceptance within one hundred twenty (120) calendar days of the date set for the opening of Technical Proposals, the Offeror will, within thirty (30) calendar days of receipt of such notice or within such additional time as the Official may authorize in writing, deliver to the Official a contract properly executed. If a contract has not been fully executed by the end of said thirty (30) day period, the City shall have the option of selecting a different proposal from another Offeror.

8. Basis for Acceptance/Conflict of Interest

Any proposal made will be accepted only on the basis that the Offeror, by filing its proposal, represents that it is made in good faith without fraud, collusion or connection of any kind with any other Offeror for the same work; that the Offeror is competing solely in its own behalf without connection with, or obligation to, any undisclosed person, firm or corporation; that no other undisclosed person, firm or corporation has any interest in the contract; that no officer, agent or employee of the City is financially interested in the contract; that the Offeror is fully informed in regard to all provisions of the contract documents, including, without limitation, the specifications and drawings, if any; the time for performance and the provisions with respect to liquidated damages, bonds and insurance, if any.

9. Offeror Qualifications

It is the purpose and intention of the Official not to award the contract to any Offeror who does not furnish evidence, when requested, satisfactory to the Official that it has the ability and experience to perform the pertinent class of work.

10. Questions Regarding the RFP

The City will not respond to oral questions regarding this RFP. All questions regarding this RFP must be submitted by email to **Krista Zalatores at krista.zalatores@boston.gov**. The subject line of an email should be "Disparity Study RFP Question". Questions must be submitted on or before **12 P.M. (noon) on Monday, October 16, 2017**.

11. Rejection of Proposals

The Official may cancel the RFP, or may reject any or all proposals, if the Official determines that cancellation or rejection serves the best interests of the City. The Official reserves the right to waive any minor informality.

12. RFP Includes by Reference All Documents Referred to and Included Therein

This RFP hereby expressly incorporates by reference any and all documents referred to herein, including without limitation all contractual terms and conditions applicable to the procurement.

13. Term of Service Contract

The term of the contract is for two years. Although the RFP Scope of Services may be completed in less than two years, the contract term will be for two years in order to provide for contingencies. The Contract shall be subject to the availability of an appropriation and may be cancelled by the City without penalty in any year in which an appropriation is not made. Please note that the City has issued this RFP with Phases I and II included as they are intrinsically connected, however the City notes that both phases, including Phase II, are subject to appropriation and may be cancelled by the City if an appropriation is not available. The City's current appropriation may only cover Phase I of the RFP.

2.14 Award of Contract

The City reserves the right to award a contract to other than the Offeror offering the lowest overall cost. If a Contract is awarded, the Contract will be awarded to that responsive and responsible Offeror whose proposal is deemed most advantageous to the City taking into consideration the evaluation criteria and proposal price.

The Official shall notify the selected Offeror in writing within the time period specified. The parties may extend the time for notification by mutual agreement. A selection notification is not a communication of final award. No final award has been made until final execution of an agreement by the City of Boston and the selected Offeror, approval by the Mayor of Boston, and issuance of a purchase order. Until such time, the City may reject some or all proposals, re-solicit, or elect not to proceed with this project.

3. Background

1. The City of Boston

The City of Boston, incorporated as a town in 1630 and as a city in 1822, is the largest city in Massachusetts and the capital of The Commonwealth of Massachusetts (the "Commonwealth"). The City and its component governmental units, with more than 17,000 employees, are responsible for the provision of a wide range of government services, including education, public safety, public health, urban planning and development and the maintenance of the City's infrastructure.

The Mayor is the chief executive officer of the City. Martin J. Walsh, the Mayor of the City, was elected to serve a four-year term from January 2014 through January 2018. The Mayor has general supervision of and control over the City's boards, commissions, officers, and departments. The legislative body of the City is the thirteen-member City Council. Mayor Walsh established a cabinet form of government to recognize the major functional responsibilities of City government, to facilitate improvements in the conduct of the executive and administrative business of the City, and to eliminate duplication and waste.

The Economic Development Cabinet's mission is to make Boston an appealing and accessible place for working families, entrepreneurs, businesses, and investors to innovate, grow, and thrive in a way that fosters inclusion, broadens opportunity, and shares prosperity, thereby enhancing the quality of life for all Bostonians and the experience for all visitors.

4. Services

1. Scope of Services

The City is seeking a consultant to assist the City in designing and conducting a Disparity Study. The requested services shall be completed across two project phases, described below. This RFP will cover the initial or Utilization phase of the Study (Phase I)

This Scope of Services is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project. Offerors may include additional scope details as part of their project plan.

All written deliverables are subject to City approval.

1. Phase I: Utilization Scan

In Phase I, the consultant will identify data sources relevant to the overall study and assist the City in defining the prospective areas of inquiry for Phase II. The tasks involved in conducting that Utilization Scan will include but not be limited to:

- 1. Procurement, Policies, Practices, & Procedures:** Assess Conduct a detailed examination of the City's laws, procurement policies and procedures, and M/WBE policies that previously and currently govern the City's procurement programs.
- 2. Data Collection:** Assess the availability of awards and payment data maintained by the City and workforce participation hours for female and minority workers on construction projects monitored by the Boston Residents Jobs Policy office. Collect all pertinent electronic and hard copy data appropriate and available to execute various analyses associated with the City's disparity study.
- 3. Estimation of M/WBE Availability:** Using various sources, assess estimate the availability of firms in the relevant geographic market area that do business or are interested in doing business with the City.
- 4. Public Sector Utilization:** Assess the availability of Collect utilization data of M/WBEs on the City's prime contracts and subcontracts for all City agencies.
- 5. Recommendations:** Based on the knowledge acquired during Phase I, provide detailed recommendations to the City on how best to design the scope, areas of focus, and sequencing of the Disparity Study, to be conducted during Phase II. In particular, during this step the consultant will help the City assess the costs and difficulty of studying each of the issues set forth in Section 2.1(a)-2.1(de) of this RFP, as well as any potential industry-specific subsets of those topics the consultant identifies during Phase I. At the conclusion of Phase I, the City will decide in its sole discretion whether to proceed with Phase II. The City has issued this RFP with Phases I and II included as they are intrinsically connected, however the City notes that both phases, including Phase II, are subject to appropriation and may be cancelled by the City if an appropriation is not available.

4.1.1.5 Recommendations: Based on the knowledge acquired during Phase I, provide detailed recommendations to the City on how best to design the scope, areas of focus, and sequencing of the Disparity Study, to be conducted during Phase II. In particular, during this step the consultant will help the City assess the costs and difficulty of studying each of the issues set forth in Section 2.1(a)-2.1(de) of this RFP, as well as any

potential industry-specific subsets of those topics the consultant identifies during Phase I. At the conclusion of Phase I, the City will decide in its sole discretion whether to proceed with Phase II. The City has issued this RFP with Phases I and II included as they are intrinsically connected, however the City notes that both phases, including Phase II, are subject to appropriation and may be cancelled by the City if an appropriation is not available.

4.1.21.1.6 Phase II: Disparity Study

The City will review the consultant's recommendations from Phase I to determine, at its discretion, how to proceed with the design and scope of the Disparity Study. Phase II of the Disparity Study may be expanded to include other Massachusetts-based governmental and quasi-governmental authorities. The tasks involved in conducting the Disparity Study will include those tasks listed above for the Utilization Scan and be expanded to include other Massachusetts-based governmental authorities and **will also include, at a minimum**, but not be limited to:+

4.1.3 Legal Review & Analysis: review of the legal framework on which disparity studies are based, and include standards established by the *City of Richmond v. J.A. Croson Co.*, as well as other relevant court cases with emphasis on program and methodological requirements.

4.1.4 Data Collection: Assess the availability of awards and payment data maintained by the City and workforce participation hours for female and minority workers on construction projects monitored by the Boston Residents Jobs Policy office. Collect all pertinent electronic and hard copy data appropriate and available to execute various analyses associated with the City's disparity study.

4.1.5 Private Sector Marketplace Analysis: identify the presence or absence of passive discrimination in the private sector.

4.1.6 Anecdotal Evidence of Discrimination: gather anecdotal information regarding contracting and purchasing practices in the City's market area from M/WBE and non-M/WBE firms through the collection of formal complaints, in-depth interviews, focus groups, and surveys.

4.1.7 Recommendations: a detailed set of recommendations based on the factual predicate information developed in the study and the consultant's extensive inventory of selected practices.

4.1.8 Relevant Geographic Market Analysis: evaluate and determine the relevant geographic market area of expended dollars with firms based on their location.

4.1.9 Public Sector M/WBE Disparity Ratios: determine whether a disparity exists by creating a disparity index as well as using statistical significance testing.

4.1. 10 Disparity Study Report: provide the City with a final report detailing the findings and recommendations of the disparity study, including but not limited to an in-depth review of public sector contracting policies, the legal framework for disparity studies, determinations as to whether a statistically significant disparity exists, methodology used to arrive at these determinations, and recommendations based on the results of the study.

6. Phase II: Disparity Study

The City will review the consultant's recommendations from Phase I to determine, at its discretion, how to proceed with the design and scope of the Disparity Study. The tasks involved in conducting the Disparity Study will include those tasks listed above for the Utilization Scan and be expanded to include, but not be limited to:+

7. Legal Review & Analysis: review of the legal framework on which disparity studies are based, and include standards established by the *City of Richmond v. J.A. Croson Co.*, as well as other relevant court cases with emphasis on program and methodological requirements.

8. Private Sector Marketplace Analysis: identify the presence or absence of passive discrimination in the private sector.

9. Anecdotal Evidence of Discrimination: gather anecdotal information regarding contracting and purchasing practices in the City's market area from M/WBE and non-M/WBE firms through the collection of formal complaints, in-depth interviews, focus groups, and surveys.
10. Recommendations: a detailed set of recommendations based on the factual predicate information developed in the study and the consultant's extensive inventory of selected practices.
11. Relevant Geographic Market Analysis: evaluate and determine the relevant geographic market area of expended dollars with firms based on their location.
12. Public Sector M/WBE Disparity Ratios: determine whether a disparity exists by creating a disparity index as well as using statistical significance testing.

5.

Technical Profile

Each Offeror must submit a Technical Proposal demonstrating how the Offeror would complete the Scope of Services outlined in Section 4. The Technical Proposal must include the following sections in the order outlined below:

1. Offeror Profile

This section constitutes a description of the business and experience of the Offeror.

2. Company Profile and Background

The Offeror must provide the following information:

- Company Name
- Federal Identification Number
- Home Office Address
- Telephone
- Address and phone number of nearest sales/support office address
- Name and phone number of contact person. This person must be capable of committing the Offeror to an agreement with the City
- Number of years company has operated under this name
- Year company was founded
- Brief description of the nature of the company's business
- Number of years company has been in present business
- Type of business organization

Describe any litigation that the Offeror has been a party to in the last five years where it was alleged that the Offeror breached a contract for similar services with a client/customer and describe any contracts for similar services that the Offeror failed to complete for similar services. Describe the facts and status of any such litigation or contract.

Identify any government entity that has debarred or otherwise prohibited the Offeror from responding to its competitive solicitations within the last five years. Describe the circumstances surrounding such debarment or other prohibition.

3. Customer References

As a part of the evaluation of the proposals submitted, the Evaluator or Evaluation Committee reserves the right to contact any and all customer references provided by the Offeror to verify the successful performance and implementation of similar projects.

Provide three recent client references for similar projects. The following information must be provided for each client:

- Entity Name
- Contact name and title
- Contact email and phone
- Number of employees and population
- Brief description of services provided to this client

4. Offeror Experience

Describe Offeror's experience providing performing financial consulting engagements for municipal entities with a focus on establishing entities with the capability and financial backing to: acquire and develop real estate, acquire or develop affordable housing and affordable commercial space, or make investments in small businesses or in energy efficient and climate-ready infrastructure. Include specific examples of previous work, in addition to the number of years the Offeror has performed such work and a list of municipal governments for which it has performed similar engagements.

5. Project Plan

Describe the process for performing the scope of services. The Project Plan should include:

- Key activities, deadlines, and deliverables required to complete the scope of services, organized in a logical, easy-to-follow manner
- Consideration as to the unique activities that may be required to complete the work of each Investment Areas included in the response
- Core activities required to understand the regulatory landscape and assess legal options available as it relates to the creation of the Entity.

The Project Plan should demonstrate the ability to quickly start Phase I with minimal additional City of Boston direction by including elements such as a proposed list of individuals and organizations to engage and examples of options for Entity legal structures for exploration.

6. Staffing

Describe the team that will be working to complete the Scope of Services, including position titles / roles and the C.V.s of individuals assigned to those roles. Provide the breakdown of time on- versus off-site and the notice required to have staff available for on-site consultation.

6. Evaluation Criteria

1. Minimum Evaluation Criteria

Each proposal received will be reviewed to determine if the proposal meets submission requirements and Minimum Criteria as presented in Appendix C. If a proposal meets these requirements, then the Evaluator or Evaluation Committee will evaluate the technical proposal, applying the Comparative Evaluation criteria.

For a proposal to be considered, an Offeror must unconditionally check a “Yes” response to each question set forth in the Minimum Criteria.

2. Comparative Evaluation Criteria

Only proposals determined to meet all Minimum Evaluation Criteria and to be otherwise legally responsive shall be evaluated pursuant to the Comparative Evaluation Criteria set forth in this section. An Evaluator or Evaluation Committee shall prepare written evaluations for each proposal. The Evaluator or Evaluation Committee shall assign a rating of “highly advantageous”, “advantageous”, or “not advantageous” to each criterion.

The City will apply the Comparative Evaluation Criteria to assist in deciding which proposal to select from among those that meet the Minimum Evaluation Criteria. A Rating for each criterion will be assigned on the basis of the documentation, and if applicable, the presentation provided by the Offeror. The comparative evaluation will assist the City in evaluation of each Offeror’s overall qualifications. All comparative evaluation ratings will be determined by the City’s Evaluator or Evaluation Committee.

The Evaluator or Evaluation Committee will not see the Price Proposals until after Technical Evaluations are complete.

The evaluation will use a rating scale of “highly advantageous”, “advantageous” and “not advantageous.” The City will undertake an evaluation of each Offeror’s technical capabilities.

In summary, the evaluation criteria are:

- Completeness, Quality and Clarity of Proposal
- Project Plan
- Functional Experience
- Municipal Experience
- Timing
- Staffing
- References

Additional detail around each investment area is provided below.

-Completeness, Quality and Clarity of Proposal

<i>Rating</i>	Criteria
<i>Not Advantageous</i>	The proposal as a whole does not address all RFP requirements and does not provide adequate information to evaluate the ability of the Offeror to meet

	the full scope of services. The proposal does not provide relevant examples of past projects. Poorly-written and difficult to follow.
<i>Advantageous</i>	The proposal as a whole addresses all or nearly all RFP requirements, but the depth of the responses does not provide sufficient information to fully evaluate the ability of the vendor to meet the full scope of services. The proposal provides relevant examples of past projects. Organized presentation of information.
<i>Highly Advantageous</i>	The proposal as a whole addresses all RFP requirements with complete responses that address the full the scope of services in detail. The proposal provides relevant examples of past projects which complement the work proposed for this project. Well-written in clear and concise language; well-structured, easy to navigate, and intuitive presentation of proposal.

-Project Plan

Rating	Criteria
<i>Not Advantageous</i>	The proposal includes a project plan that demonstrates little insight into understanding the City’s needs as described in the RFP scope of services. The plan does not detail a comprehensive process for performance as it pertains to the separate phases described in the scope of services.
<i>Advantageous</i>	The proposal includes a written report and proposed project plan that demonstrates an understanding of the City’s needs as described in the RFP scope of services. The plan includes a description of the project workflow and the process for performing the separate phases described in the scope of services.
<i>Highly Advantageous</i>	The proposal includes a written report and proposed project plan that demonstrates a strong understanding of the City’s needs as described in the RFP scope of services. The plan includes a detailed description of the project workflow and the process for performing the separate phases described in the scope of services. The proposal as it relates to the design and conduct of a Disparity Study is realistic and demonstrates an understanding of the unique context and needs of the City of Boston.

-Functional Experience

Rating	Criteria
<i>Not Advantageous</i>	The proposal demonstrates minimal experience with researching, designing, and conducting disparity studies. Offeror has completed one or fewer

	comparable projects involving the preparatory analysis for or design of a disparity study. The Offeror has less than 3 years relevant previous experience successfully designing and conducting disparity studies.
<i>Advantageous</i>	The proposal demonstrates moderate experience with researching, designing, and conducting disparity studies. Offeror has completed two or fewer comparable projects involving the preparatory analysis for or design of a disparity study. The Offeror has less than 5 years relevant previous experience successfully designing and conducting disparity studies.
<i>Highly Advantageous</i>	The proposal demonstrates deep experience with researching, designing, and conducting disparity studies. Offeror has completed three or more comparable projects involving the preparatory analysis for or design of a disparity study. The Offeror has more than 5 years relevant previous experience successfully designing and conducting disparity studies.

-Municipal Experience

Rating	Criteria
<i>Not Advantageous</i>	The proposal demonstrates minimal experience working within a municipal regulatory and legal environment. The Offeror can provide one or fewer examples of project work that required developing an in-depth understanding of regulatory and legal constraints in a municipal context.
<i>Advantageous</i>	The proposal demonstrates moderate experience working within a municipal regulatory and legal environment. The Offeror can provide two or more examples of project work that required developing an in-depth understanding of regulatory and legal constraints in a municipal context.
<i>Highly Advantageous</i>	The proposal demonstrates deep knowledge of working within a municipal regulatory and legal environment. The Offeror can provide three or more examples of project work that required developing an in-depth understanding of regulatory and legal constraints in a municipal context. Project work demonstrates the ability to think creatively and come up with innovative solutions within a legally constrained context.

-Timing

Rating	Criteria
<i>Not Advantageous</i>	The Proposal fails to provide a detailed timeline.

<i>Advantageous</i>	The Proposal provides a detailed timeline that projects completion of Phase I in four months , and Phase II in 12 months . If the project completion is projected outside of this timeframe, a compelling explanation is provided.
<i>Highly Advantageous</i>	The Proposal provides a detailed and realistic timeline that projects project completion of Phase I within four months, and Phase II within 12 months . The timeline includes checkpoints and a methodology for adjusting the process to account for contingencies while maintaining the projected timeline. A compelling justification is provided if a longer timeline is provided.

-Staffing

Rating	Criteria
<i>Not Advantageous</i>	The proposal identifies the position titles / roles that will be involved in the project but does not identify the specific individuals or identifies individuals with experience that does not meet the needs of this project.
<i>Advantageous</i>	The proposal identifies the position titles / roles of most of the individuals proposed for the project, including the project manager that will be assigned to this project. The Project Manager identified has at least five (5) years' of relevant experience for this project. Staff is available for on-site consultation, as requested by the City, with reasonable notice.
<i>Highly Advantageous</i>	The proposal identifies the position titles / roles of most of the individuals proposed for the project, including the project manager that will be assigned to this project. The Project Manager identified has at least ten (10) years' of relevant experience for this project. Staff is available for on-site consultation, as requested by the City, on short-term notice.

-References

Rating	Criteria
<i>Not Advantageous</i>	Offeror has one (1) or less excellent references for comparable work.
<i>Advantageous</i>	Offeror has two (2) excellent references for comparable work.
<i>Highly Advantageous</i>	Offeror has three (3) excellent references for comparable work.

7.

Price Proposal

1. Price Proposal Instructions

Each Offeror shall submit a Price Proposal (See Appendix B: Price Proposal).

The Price Proposal asks for details concerning the components of the pricing that goes into each Offeror's overall proposal. Understanding the level of effort and cost for the deliverables enables the City to better understand the structure of the proposed work.

The Price Proposal requires the use of Appendix B to present a detailed cost breakdown.

1. Based upon an informed reading of the RFP and the Offeror's expertise, we ask that the Offeror determine the amount of effort it will take to complete the services and deliverables described in the Scope of Services, Section 4.1 and 4.2 and 4.2. Enter the total estimated hours and hourly labor cost per position for these services and deliverables in columns A, B and C. The estimated hours and hourly rates are for informational purposes and do not make the project a time and materials project. The total shall be the total fixed price. The fixed price includes all travel and incidental expenses—no travel reimbursement or reimbursement of expenses is available under this RFP.

2. The selected Offeror shall be available for additional consulting services directly related to this RFP, at the City's sole discretion, at the hourly rates provided in response to this RFP, and pursuant to a contract amendment, additional statement of work, or purchase order, as applicable and as permitted by law. If there are additional positions and hourly rates that are applicable to such work, Offeror may include such additional information in the price proposal, columns D and E.

3. The total cost that is quoted in this Proposal will be considered a best and final offer.

Appendix A: Standard Contract Forms

Offerors must complete and sign all of the following standard contract forms

Form CM06: Certificate of Authority (For Corporations Only)
Please complete the entire form and sign

Form CM09: Contractor Certification
Please complete the entire form and sign

Form CM10-11: Standard Contract
Please review

Forms CM15A-B: CORI
Please complete and sign form A

Living Wage Forms (LW-2 and LW-8)
Please complete and sign forms LW-2 and LW-8, as applicable

Wage Theft Form (CM-16)
Please complete the entire form and sign

Appendix B: Price Proposal

List all costs associated with completing the services and deliverables identified in the Scope of Services section of the RFP.

For detailed instructions, see Section 7.1 in the RFP.

Phase I (Section 4.1.1): Utilization Scan

4.1.1. Phase 1 - Total Price	B. Total Hours Estimated	C. Hourly Rate	Total
Position Title:			
Position Title:			
Position Title:			
Total Fixed Price			

Phase II (Section 4.1.2): Disparity Study

4.1.1. Phase 2 - Total Price	B. Total Hours Estimated	C. Hourly Rate	Total
Position Title:			
Position Title:			
Position Title:			
Total Fixed Price			

Phase II (Section 4.1.2): Implementation Support

4.1.2. Phase 2 - Total Price	B. Total Hours Estimated	C. Hourly Rate	Total
Position Title:			
Position Title:			
Position Title:			

Total Fixed Price			
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D. Optional Additional Services	E. Hourly Rate
Position Title:	
Position Title:	
Position Title:	
Position Title:	
Position Title:	
Position Title:	
Position Title:	
Position Title:	
Total:	

NOTE: All travel and subsistence is to be INCLUDED in the Labor Costs. The City will NOT separately reimburse for travel, lodging, subsistence and miscellaneous (ad-hoc) expenses.

 Authorized Representative

Appendix C: Minimum Evaluation Criteria

Minimum Qualifications for Proposal: Please respond **Yes** or **No** to the questions below:

Has an authorized representative of the Offeror signed the proposal where required and returned all requested forms?

Yes No

Did Offeror submit separate sealed Price and Technical proposals as required by law?

Yes No

Has Offeror submitted completed signed copies of Standard Contract Forms as indicated in Appendix A ?

Yes No

Offeror has experience performing compensation studies for at least three years.

Yes No

Appendix D: List of Positions