



The City of  
**WORCESTER**

Administration & Finance – Purchasing Division  
Christopher J. Gagliastro, MCPPO – Purchasing Director  
455 Main Street, Room 201, Worcester, MA 01608  
P | 508-799-1220  
[purchasing@worcesterma.gov](mailto:purchasing@worcesterma.gov)  
[www.worcesterma.gov](http://www.worcesterma.gov)

**Christopher J. Gagliastro, MCPPO**  
**Purchasing Agent**

**RFP NO.: 7683-W2**  
**ISSUANCE DATE: 9/28/2021**

**BUYER: Christopher J. Gagliastro**

**AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER  
REQUEST FOR PROPOSALS  
NOTICE TO PROPOSERS**

**RFP TITLE: Consultant - Executive Search – Superintendent of Schools / WPS**

***REFER TO PAGE 7 FOR PROPOSAL SUBMISSION INFORMATION***

**General Conditions:**

All proposals are subject to the terms, conditions and specifications herein set forth:

- 1. Scope: Provide executive search recruiting services for a new Superintendent of Schools as per the attached requirements and specifications of the City of Worcester Public Schools.**
- A certified check or bid bond made payable to the "City Treasurer, City of Worcester" in the amount of N/A must accompany this proposal. This must be submitted under separate sealed cover marked "Proposal Security." In the case of default, the surety shall be forfeited to the City as liquidated damages.
- All terms and conditions are applicable to this proposal except the following section(s) which are hereby deleted from this RFP: 4, 22, 23, 27, 30
- A performance bond in the amount of N/A will be required. If this proposal is accepted by the City and the Proposer shall fail to contract as set forth in these requirements and to give a bond in the aforementioned amount, within ten (10) days, (not including Sundays, Saturdays, or a legal Holiday) from the date of the mailing of a notice from the City to the Proposer, according to the address given herewith, that the contract is ready for signature, the City may by option determine that the proposer has abandoned the contract and thereupon the proposal and acceptance shall be null and void and the proposal security accompanying this proposal shall become the property of the City as liquidated damages.

**Any prospective proposer requesting a change in or interpretation of existing specifications or terms and conditions must do so within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal opening date. All requests are to be in writing to the Purchasing Division and are to be in duplicate. No changes will be considered or any interpretation issued unless request is in our hands within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal submission date.**

**Any inquiries related to technical or contractual matters must be submitted in writing to:**

**Christopher J. Gagliastro, MCPPO  
Purchasing Director  
City of Worcester, City Hall  
455 Main Street, Room 201  
Worcester, MA 01608  
[gagliastroc@worcesterma.gov](mailto:gagliastroc@worcesterma.gov)**

5. Nothing herein is intended to exclude any responsible Proposer or in any way restrain competition. All responsible Proposers are encouraged to submit proposals. The City encourages participation by Minority and Women Owned Business Enterprises (M/WBE).
6. The following meanings are attached to the defined words when used in this RFP.
  - a) The word "City" means The City of Worcester, Massachusetts.
  - b) The word "Proposer" means the person, firm or corporation submitting proposal on these specifications or any part thereof.
  - c) The word "Contractor" means the person, firm or corporation with whom the contract is made by carrying out the provisions of these specifications and the contract.
  - d) The words "Firm Price" shall mean a guarantee against price increase during the life of the contract.
7. All proposals and other documents relating to this RFP are subject to the public records provisions of M.G.L. c.30B, and shall remain confidential until the time specified in c.30B section 6 (d).
8. All material submitted by vendors becomes the property of the City. The City is under no obligations to return any of the material submitted by a vendor in response to this RFP.
9. Each vendor's proposal must remain in effect for at least 120 days from the deadline for its submission. The City will decide upon acceptance within 120 days of submission.
10. It is understood and agreed that it shall be a material breach of any contract resulting from this RFP for the Contractor to engage in any practice which shall violate any provision of Massachusetts General Laws, Chapter 151B, relative to discrimination in hiring, discharge,

compensation, or terms, conditions or privileges of employment because of race, color, religious creed, national origin, sex, age or ancestry.

11. The City reserves the right to accept or reject any or all of the proposals submitted and waive informalities and technicalities.
12. The City will review and analyze each proposal, and reserve the right to interview selected proposers. The City shall select the proposer, which in the City's opinion, has made the proposal best suited to the needs and goals of the City and its operations and deemed to be in compliance with the terms of this RFP.
13. The Contractor will be required to indemnify and save harmless the City of Worcester for all damages to life and property that may occur due to his or her negligence or that of his or her employees, subcontractors, etc. during the contract derived from this RFP.
14. The Contract Agreement will be drafted by the City's Law Department in compliance with the terms of the RFP, and may incorporate the terms of this RFP and of the proposal selected.
15. The Proposer must certify that no official or employee of the City of Worcester, Massachusetts, is pecuniarily interested in this proposal or in the contract which the proposer offers to execute or in expected profits to arise therefrom, unless there has been compliance with the provisions of G.L.C. 43 section 27, and that this proposal is made in good faith without fraud or collusion or connection with any other person submitting a proposal.
16. Any proposal withdrawn after time and date specified, the proposer shall forfeit deposit on proposal as liquidated damages.
17. A vendor conference will be held as follows: N/A
18. The Contractor shall not assign, transfer, sublet, convey or otherwise dispose of any contract which results from this RFP, or its right, title or interest therein or its power to execute the same to any other person, firm, partnership, company or corporation without the previous consent in writing of the City. Should the Contractor attempt any of the above without the written consent of the City, the City reserves the right to declare the Contractor in default and terminate the contract for cause.
19. The Contractor shall obtain and maintain in force at all times during the term of the contract derived from this RFP, insurance coverage pertaining to Public Liability, Property Damage and Worker's Compensation in the following types and amounts:
  - A) PUBLIC LIABILITY INSURANCE - Contractor to supply the City of Worcester with certificates of insurance covering public liability in an amount not less than \$1,000,000.00 to any one person, and not less than \$ 1,000,000.00 on account of one accident.

B) PROPERTY DAMAGE INSURANCE - Contractor to supply the City with certificates of insurance covering property damage in an amount not less than \$1,000,000.00 for damages on account of any one accident, and not less than \$2,000,000.00 on account of all accidents.

C) COMPENSATION INSURANCE - The Contractor shall furnish the City with certificates showing that all its employees shall be connected with the management operations are protected under worker's compensation insurance policies.

20. The Contractor shall carry Public Liability Insurance with an insurance company satisfactory to the City so as to save the City harmless from any and all claims for damages arising out of bodily injury to or death of any person or persons, and for all claims for damages arising out of injury to or destruction of property caused by accident resulting from the use of implements, equipment or labor used in the performance of the contract or from any neglect, default or omission, or want of proper care, or misconduct on the part of the Contractor or for anyone in his or her employ during the execution of the contract derived from this RFP.
21. Prior to starting on the contract derived from this RFP, the Contractor shall deposit with the Purchasing Division, certificate from the insurer to the effect that the insurance policies required in the above paragraph have been issued to the Contractor. The certificates must be on a form satisfactory to the City.
22. All prices quoted must include inside delivery, and set-up in place F.O.B. destination to pre-designated City of Worcester departments.
23. No special charges will be allowed for rigging, packing, crating, freight, express, or carriage unless specifically stated and included in the vendor's proposal.
24. The award to the successful proposer may be cancelled in the event of vendor nonperformance as may be determined by the City.
25. The successful proposer shall comply with all applicable federal, state and local laws, ordinances, and regulations. The awarded contract shall be governed under the laws of the Commonwealth of Massachusetts.
26. Purchases made by the City are exempt from Federal and Massachusetts state taxes and proposal prices must exclude any such taxes. Tax exemption certificates will be furnished upon request.
27. When the contract is executed, a performance bond, in the full amount of the contract, is required. See paragraph 4. The bond will be of a surety company qualified to do business under the laws of the Commonwealth of Massachusetts. The cost of this bond is the vendor's responsibility. Bonds shall remain in force and effect thru the performance of the contract.
28. Expenditures by the City and authorization to spend for particular purposes are made on fiscal year basis. The City's fiscal year is the twelve month period ending June 30 of each

year. The obligations of the City under any agreement to be reached are subject to the appropriation or authorization of the necessary funds. The City agrees to make reasonable efforts to obtain funding and all necessary authorization.

29. No amendment to the contract shall be effective unless it is in writing and signed by authorized representatives of both parties and is accepted by the City of Worcester.
30. The vendor (and its insurers, if any) shall bear all risk of loss or damage to the equipment which occurs in transit to the user site. The risk of loss or damage to purchased equipment shall remain with the vendor until the purchase price has been paid and title has passed. The vendor shall also bear the risk of loss or damage to leased or rented equipment during the City of Worcester's possession and use thereof subject, however to such conditions and limitations as may be stated elsewhere in the contract.
31. The vendor shall not assign or in any way transfer any interest in the contract without the prior written consent of the City provided, however, that claims for money due or to become due to vendor from the City may be assigned to a bank, trust company, or other financial institution without such consent so long as notice of such assignment is furnished promptly to the City. Any such assignment shall be expressly made subject to all defenses, set-offs, or counter-claims which would have been available to the City against the vendor in the absence of such assignment.
32. None of the services to be provided by the vendor pursuant to the contract shall be subcontracted or delegated to any other organization, association, individual, corporation, partnership or other such entity without the prior written consent of the City. No subcontract or delegation shall relieve or discharge the vendor from any obligation or liability under the contract except as specifically set forth in the instrument of consent. Any subcontract to which the City has consented shall be attached to the original of the contract on file in the City of Worcester.
33. Neither party will be liable to the other or be deemed to be in breach of the contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include but are not limited to, acts of God or the public enemy, fires, floods, epidemics, quarantine restrictions, strikes, freight, embargoes, and unusually severe weather. If the vendor's failure to perform is caused by the default of the subcontractor, and if such default arises out of causes beyond the reasonable control of both the vendor and the subcontractor, and without the fault or negligence of either of them, the vendor shall not be liable for any excess costs for failure to perform, unless the equipment or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the vendor to meet the required delivery schedule. Dates or times of performance will be extended to the extent of delays excused in this section, provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.

34. The vendor shall provide to the City of Worcester a warranty and a commitment which clearly states that all equipment and services proposed and supplied by the Vendor, and/or its subcontractors, performs as expected and promised by the Vendor.
35. The vendor represents that no person other than bona fide employees working solely for the vendor, have been employed or retained to solicit or secure this agreement upon an arrangement or understanding for a commission, percentage, brokerage fee, gift or any other consideration contingent upon the award or making of this contract. For breach or violation of the representation, the City shall have the right to annul the contract without liability, or in its discretion to deduct from the contract price or consideration, or otherwise recover the full amount of such commission, percentage, brokerage fee or other consideration.
36. Any contract made by the City in which the Purchasing Agent or any employee of his/her department, the heads of using agencies or any other officer or employee of the City having a part in the placing of such contract is financially interested, directly or indirectly, shall be void.
37. The vendor shall not discriminate against any qualified employee or applicant for employment because of race, color, national origin, ancestry, age, sex, religion or medical handicap. The vendor agrees to comply with all applicable Federal and State Statutes, rules and regulations prohibiting discrimination in employment including: Title VII of the Civil Rights Acts of 1964; The Age Discrimination in Employment Act of 1967; Section 504 of the Rehabilitation Act of 1973; Massachusetts General Laws Chapter 151B, Section 4 (1) and all relevant administrative orders and executive orders.

If a complaint or claim alleging violation by the vendor of such statutes, rules or regulations is presented to the Massachusetts Commission Against Discrimination (MCAD), the vendor agrees to cooperate with MCAD in the investigation and disposition of such complaint or claim.

In the event of vendor noncompliance with the provisions of this section, the City shall impose such sanctions as it deems appropriate, including but limited to:

- 1) Withholding of payments due vendor under the contract until vendor complies.
- 2) Termination or suspension of the contract.

## **SUBMISSION OF PROPOSALS**

38. Proposals must be submitted in two (2) packages according to the instructions below. The City intends to consider responses in the evaluation requirements before considering costs. **Therefore, no reference to pricing may be made in the proposal of evaluation considerations.**

A sealed package containing **the original, 5 copies plus 1 PDF copy on USB drive** of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Consultant - Executive Search – Superintendent of Schools / WPS – Technical Proposal**

**455 Main Street, Room 201  
Worcester, MA 01608**

**Re: RFP No. 7683-W2**

A sealed package containing **the original copy** of the proposal **must** be labeled as follows:

**Purchasing Agent, City of Worcester**

**Consultant - Executive Search – Superintendent of Schools / WPS – Price Proposal**

**455 Main Street, Room 201  
Worcester, MA 01608**

**Re: RFP No. 7683-W2**

*Price proposal page is located at end of the specifications.*

**Proposals must be delivered no later than Wednesday, October 27, 2021 at 10:00 AM LOCAL TIME. Late submissions will be rejected, regardless of circumstances.** The City of Worcester is not responsible for submittals not properly marked.

The evaluation and cost proposals will remain confidential until a formal and finalized contract has been executed.

## **RFP EVALUATION**

39. The City of Worcester Purchasing Agent will assign an evaluation team, hereafter referred to as the Selection Committee, to perform a full and complete evaluation of RFP submittals. The Purchasing Agent will ultimately forward a formal recommendation of award to the City Manager who has final award authority.
40. RFP evaluation responses will be evaluated by the Selection Committee based directly upon vendor's response to mandatory and comparative evaluation criteria. Vendors must meet or exceed the mandatory criteria requirements or be rejected as non-responsive.

Comparative criteria will be evaluated by the use of four rating categories as set forth by M.G.L. Chapter 30B:

- 1) HIGHLY ADVANTAGEOUS - Vendor's submittal meets all the stated requirements and offers significant performance above the stated requirements.
- 2) ADVANTAGEOUS - Vendor's submittal meets the stated requirements without risk or disadvantage.
- 3) NOT ADVANTAGEOUS - Vendor's submittal contains some risk or disadvantage but is not unacceptable.
- 4) UNACCEPTABLE - Vendor's submittal fails to meet the standards of the stated requirements.

After proposals have been assigned ratings on the basis of each evaluation criterion, a composite rating will be established by the Selection Committee. Submittals will then be ranked based upon finalized composite rating.

41. The Purchasing Agent will identify the most advantageous proposal based upon the rankings of the Selection Committee and an evaluation of the cost proposals received. The Purchasing Agent will forward a recommendation for award to the City Manager based upon the most advantageous proposal received considering evaluation rankings and cost proposals received.



GIVE FULL NAMES AND RESIDENCES OF ALL PERSONS INTERESTED IN THE FOREGOING PROPOSAL.

(NOTICE: Give first and last name in full; in case of corporations, give corporate name and names of President, Treasurer, and Manager; and in case of firms give names of the individual members)

Name	Address	Zip Code
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KINDLY FURNISH THE FOLLOWING INFORMATION REGARDING BIDDER:

(1) If an Individual or Proprietorship

Name of Owner \_\_\_\_\_

Business Address \_\_\_\_\_

Zip Code \_\_\_\_\_ Telephone No. \_\_\_\_\_

Email \_\_\_\_\_

Home Address \_\_\_\_\_

Zip Code \_\_\_\_\_ Telephone No. \_\_\_\_\_

(2) If a Partnership, Full names and addresses of all partners

<u>Name</u>	<u>Address</u>	<u>Zip Code</u>
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Business Address \_\_\_\_\_ Zip Code \_\_\_\_\_

Tel. No. \_\_\_\_\_

(3) If a Corporation

Full Legal Name: \_\_\_\_\_

State of Incorporation: \_\_\_\_\_ Qualified in Massachusetts? Yes \_\_\_\_\_ No \_\_\_\_\_

Principal Place of Business \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Email: \_\_\_\_\_

Telephone No. \_\_\_\_\_

Place of Business in Massachusetts \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Telephone No. \_\_\_\_\_

GIVE THE FOLLOWING INFORMATION REGARDING SURETY COMPANY

Full Legal Name of Surety Company \_\_\_\_\_

State of Incorporation \_\_\_\_\_ Admitted in Massachusetts ? Yes \_\_\_\_\_ No \_\_\_\_\_

Principal Place of Business \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Place of Business in Massachusetts \_\_\_\_\_  
Street P.O. Box

City/Town State Zip

Telephone No. \_\_\_\_\_

NOTE:

The Office of the Attorney General, Washington, D.C. requires the following information on all bid proposals amounting to \$1,000.00 or more.

E.I. Number of bidder \_\_\_\_\_

This number is regularly used by companies when filing their "EMPLOYER'S FEDERAL TAX RETURN, U.S." Treasury Department Form 941.

AUTHORIZED SIGNATURE OF BIDDER \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

UNDER MASSACHUSETTS GENERAL LAWS, CHAPTER 30B: SECTION 10, THE FOLLOWING CERTIFICATION MUST BE PROVIDED:

Section 10. A person submitting a bid or a proposal for the procurement or disposal of supplies, or services to any governmental body shall certify in writing, on the bid or proposal, as follows:

"The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals."

(Please Print)

\_\_\_\_\_  
Name of Person Signing Bid

\_\_\_\_\_  
Signature of Person Signing Bid

\_\_\_\_\_  
Company

No award will be made without vendor certification of the above.

***All proposals must include the above non-collusion certificate with submission.***



# SUPERINTENDENT SEARCH FOR WORCESTER PUBLIC SCHOOLS

Request for Proposals for Executive Search Firm

Deadline: October 27, 2021

## **SUPERINTENDENT SEARCH FOR WORCESTER SCHOOLS REQUEST FOR STATEMENT OF QUALIFICATIONS FOR EXECUTIVE SEARCH FIRM**

The Superintendent Search for Worcester Public Schools hereby requests proposals from qualified firms to provide Executive Search Consultant Services for the position of Superintendent for the Worcester Public School system. To ensure that the Search Committee obtains the most qualified firm that can most effectively deliver the required services, the Search Committee requests proposals be submitted in compliance with the requirements set forth below.

Please be advised that this search will go at an accelerated rate, with the goal of the next Superintendent taking office on July 1, 2022. Interested firms, therefore, must be willing to commit the necessary staff resources to accommodate that appointment timeline. The Search Committee reserves the right to reject or accept any proposal based on criteria established at its sole discretion in compliance with MGL.

### **Scope of Services**

The School Committee of the Public Schools of Worcester is seeking a collaborative executive search firm to work with the School Committee and the community in recruiting a new Superintendent of Schools. The contract will begin when approved by the School Committee. The final vote to hire the Superintendent must take place no later than April 4, 2022, unless mutually agreed by the School Committee and the Consultant. This contract will continue until all negotiations with the successful superintendent candidate are completed and the employment contract is signed.

### **Scope of Work - Overview**

#### **1. Best practices:**

- a. The Consultant shall work collaboratively to guide actions taken by the School Committee and its representatives to be professional and to act in the best interests of the Worcester community using standard best practices for hiring our next public school superintendent for grades Pre-K through 12.

#### **2. Candidate Selection Criteria:**

- a. Assist the School Committee in defining the leadership needs of the district and in establishing selection criteria for a new superintendent by soliciting input from the School Committee, parents, staff, administration, City officials, and the community through focus groups, interviews, and an online survey for those unable to attend a specific meeting.
- b. Review the current job description for the position of Superintendent of Schools, and recommend revisions subject to School Committee approval.
- c. Organize, publicize, and facilitate at least four (4) and up to ten (10) focus

groups to gather input on the type of leadership to be sought from the next Superintendent from all stakeholders in the community, including, but not limited to, school department employees, elected and appointed government officials, parents, students, community partners, and other interested residents of Worcester.

- d. Conduct at least three (3) and up to ten (10) individual or small group interviews with individuals specifically identified by the School Committee.
- e. Conduct an online survey in multiple relevant languages to collect broad community input for those not able to attend or not invited to a specific focus group.

### **3. Search Process Management:**

- a. The Consultant shall work hand-in-hand with the School Committee to ensure that Worcester obtains the best candidate to meet our community and district needs and consensus-formed priorities, both for today and in the future. This is to be a collaborative process.

#### **b. Timeline:**

- i. Develop the Superintendent search schedule and timeline
- ii. Recommend method of advertising including publication, frequency and duration, and coordinate advertising. Advertising costs are not to be included in the proposal price.
- iii. Develop application package including requirements and submission.
- v. Ensure process is designed to attract a national pool of highly-qualified and diverse candidates.

### **4. Communication**

- a. The Consultant shall work collaboratively with the School Committee throughout the process, and keep the School Committee informed about what is occurring at each stage. The consultant shall also support the School Committee in keeping the community informed via regular brief written updates.
- b. The Consultant shall meet with the School Committee several times throughout the search and provide written and scheduled progress reports.
- c. The Consultant will coordinate or provide the school district an up-to-date and maintained website for community information and updates about the search process.
- d. Finalize for publication a "leadership profile" based on the synthesis of communicated skills and experiences generated from focus group and community input. Profile will be communicated to potential candidates.

- e. Use of Social Media should be explained by the consultant in terms of how it will be used during the selection process.

## **5. Recruitment Process**

### **Process:**

- a. The Consultant shall ensure that the search process is transparent, thorough, and will engage as many stakeholders as feasibly possible in order to best represent and engage our diverse professional, parent, and resident community.
- b. Present findings to the School Committee of selection criteria recommendations from the data gathered.

### **Document Development:**

- c. Assist the School Committee in developing descriptive documents for prospective applicants, including requirements, submissions, and timelines.

### **Candidate Recruitment (minimum):**

- d. Conduct direct and indirect search recruitment activities via networking and advertising publications in order to generate a national pool of high-quality, diverse applicants. A racially and demographically diverse candidate pool is a requirement.
- e. Determine method of direct recruiting, including professional networks.

### **Candidate Screening:**

- f. Prescreen and verify submitted application materials for completeness and to ensure that all candidates meet all requirements prior to advancing in the process.
- g. Determine with School Committee the number of initial screening candidates (those invited for interviews with the screening committee) and the number of semi-finalists and finalists (those invited for interviews with the full school committee).
- h. Search firm will verify credentials and conduct extensive reference checks of finalists to be advanced to the full committee.

## **6. Selection Process**

### **Superintendent Search Committee:**

- a. A separate Superintendent Search Committee (SSC) to conduct candidate screenings and first- tier interviews will be appointed by the Mayor.
- b. Search firm will be responsible for conducting an orientation and interview training of all members of the SSC (pertinent laws, regulations, and policies).
- c. The successful Proposer will be responsible for all scheduling related to the work

of the Superintendent Search Committee, and will ensure that their work is completed in a timely manner.

- d. Manage Superintendent Search Committee. This will include reviewing screened candidates' paperwork, developing interview questions, developing a scoring rubric, conducting interviews, and identifying finalists who will be advanced to the full school committee.

#### **Final Candidate Selection Process:**

- e. Assist the School Committee in the formal selection process, including number of candidates and the number of semi-finalists, along with any additional interview committee that may be needed.
- f. Consultant to begin finalist interviews no later than February 14, 2022, unless a different date is mutually agreed by the Consultant and the School Committee
- g. Finalists determined by March 3, 2022, unless a different date is mutually agreed by the Consultant and the School Committee.
- h. Schedule candidate site visits and Worcester community introductions for the finalist.
- i. Manage interviews of finalists with the full School Committee. This will include reviewing screened candidates' paperwork, assisting with the development of interview questions, developing a scoring rubric and conducting interviews.
- j. Search firm will manage reference checking and site visits to place of employment of finalists and of candidates to the Worcester Public Schools.

#### **Candidate Negotiations and Employment Offer:**

- k. School Committee will develop and negotiate contract of employment.

#### **Consultant Conditions:**

- l. Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the consultant.
- m. Advertising expenses will be funded by the district after School Committee approves of marketing plan.
- n. The search will be deemed complete upon a signed contract with a new Superintendent.

## **II. EVALUATION OF PROPOSALS**

### **A. Minimum Evaluation Criteria**



Any Proposer submitting a proposal must satisfy all of the minimum criteria noted below. Proposals shall include information demonstrating compliance with each of these criteria.

- 1) The selected firm must have recent experience (in the past 24 months) in conducting a successful search (selection of a candidate and acceptance of a position, as facilitated by your firm) for a Superintendent of Schools for an urban PreK-12 school district with at least 20,000 students.
- 2) A summary of the firm's experience in conducting executive searches for superintendent of schools for urban PreK-12 school districts.
- 3) A list of recent assignments in education and/or related fields, including the names of client institutions and the titles of positions for which searches were conducted.
- 4) The names, addresses, and telephone numbers of at least three individuals who may be contacted to comment on the firm's performance in recent searches.
- 5) Evidence of commitment to, and successful experience in recruiting outstanding candidates from culturally diverse backgrounds.
- 6) The name of each staff member who will be assigned to this search, a brief summary of his/her relevant credentials and experience, and an indication of the proposed time commitment to this project. Please identify the lead staff person and provide contact information.

**Based on its review of proposals received by October 27, 2021, the Search Committee may invite firms to meet with them prior to selection if deemed necessary. A final determination/award will be made on or about October 28, 2021 and is subject to Worcester School Committee approval.**

*SCHEDULE – KEY DATES IN THE SUPERINTENDENT SELECTION PROCESS*

- |                                   |                                    |
|-----------------------------------|------------------------------------|
| 1. RFP solicitation begins        | September 24, 2021                 |
| 2. RFP proposals due              | October 27, 2021                   |
| 3. School Committee approval      | October 28, 2021                   |
| 4. Position posted                | January 4, 2022                    |
| 5. Interviews by Search Committee | February 14, 2022 (week beginning) |
| 6. Finalist selected              | April 4, 2022                      |
| 7. Superintendent takes office    | July 1, 2022                       |

This solicitation shall not be construed in any manner to be an obligation by the District to enter into an agreement with any vendor.

The Search Committee reserves the right to reject any or all responses. The Search Committee may negotiate the terms of the contract with the selected vendor prior to entering into a contract.

The Search Committee reserves the right to revise in part this Request. If the Search Committee cancels or revises this Request, all respondents will be notified by addenda. The Search Committee also reserves the right to extend the date responses are due. Statements of interest and any other information submitted in response to this Request shall become the property of the Search Committee. Notwithstanding any indication by Responder of confidential contents, and with the exception of bona fide confidential information, contents of responses are public documents subject to disclosure under the Massachusetts Public Records Law after award.

The Search Committee will not provide compensation to Responders for any expenses incurred by Responders for response preparation or for any demonstration that may be made. Contractors submit responses at their own risk and expense.

## **General Information about the District**

### **Background**

As of January 1, 2021, there were over 27,582 school aged children (Kindergarten to Grade 12) residing in the City of Worcester, and of that, over 23,326 of the students, or about 84.6%, attend the Worcester Public Schools (or specialized collaborative placements). When including pre-school students of 910 students, the district enrollment is 23,872 on January 1, 2021 which includes students within 44 schools and 5 alternative pathway programs. With 4,753 employees, including 2,546 teachers, the district is the third-largest school district in the Commonwealth (behind Boston with 48,112 students and Springfield with 24,239 students) and the second-largest employer in the City of Worcester behind UMass Memorial Health Care with 11,491 employees.

The student demographics in Worcester include 43% Hispanic, 29% White, 17% African American, 6.5% Asian, and 4.4% of other or multi-race designation. More than 58% of the district's students have a first language other than English. Poverty is common in urban school districts, and in Worcester, about 81% of the student body is classified as high needs (unduplicated count of students with disabilities, English language learners (ELL) and former ELL students, or low-income students (eligible for free/reduced price school lunch). Of the district's enrollment, 64% of students are categorized as economically disadvantaged (students' participation in one or more state-administered programs, such as Supplemental Nutrition Assistance, Transitional Assistance for Families with Dependent Children, the Department of Children and Families' foster care program, and MassHealth program). Upon return to full in-person instruction, the district is expected to serve nearly 4.8 million school meals annually which equates to 9,860 breakfasts and 17,100 lunches daily, along with afternoon snacks/dinner and summer meals. Also, approximately 11,400 students, including charter schools, parochial schools, and private school students are provided transportation to and from school daily with approximately 230 buses and pupil vans traveling over 11,500 miles per day.

### **District Strategic Plan**

The Worcester Public Schools' current strategic plan is a plan that was shaped and developed to bring us to 2023. The goal of the committee would be to work with the next superintendent and all stakeholders on our next strategic plan and objectives. Seeing what we have achieved and where we need to continue to grow will be crucial in the next superintendent's success.

### **Mission of Worcester Public Schools**

Provide all students the opportunity to advance their scholarship with a rigorous core curriculum and high-quality instruction.

This enables students to discover the expanse of their academic talents, shape the quality of their character, and develop the confidence to become conscientious, reflective citizens who are empowered to better our community and our world.

### **Our Vision for 2023**

Worcester Public Schools will be a national leader in education, offering high-quality

learning experiences, ensuring that all young people are prepared to thrive, and equipping them to become engaged citizens in their community.

### Theory of Change

IF we embrace a student-centered approach that:

- fosters innovation in schools;
- provides vital supports for teaching and learning;
- ensures access to modern technology;
- develops the critical thinking and technical skills of all students; and
- leverages the input of families and community;

THEN we will build a system of diverse, high-performing schools that can equip all students with the academic, social, and technical skills necessary to thrive.

### Worcester Public Schools in 2023

The Worcester community will transform its public school system into one which ensures all students receive a high-quality education and are prepared for the challenges of tomorrow.

### Culture of Innovation

All students will have access to high quality learning experiences which leverage effective approaches.

Worcester will foster a districtwide culture of innovation by testing and spreading evidence-based practices and supporting school leaders in making improvements. Worcester will develop an incubation hub to provide a structured approach to piloting and scaling effective practice in the district.

### Academic Excellence

All students will have access to rigorous and personalized learning supported by technology.

Worcester will improve early education experiences to ensure all students have the knowledge and skills to become lifelong learners. The district will also create a range of stimulating educational experiences in all grades which challenge the intellectual demands of students; develop technological and career skills; and provide students with choices in their academic preparation.

### Welcoming Schools

All students will gain a holistic set of skills and be supported by a network—inclusive of their families and the community—to realize their personal, academic, and professional goals.

Worcester will cultivate welcoming environments in all schools by supporting students' social and emotional health and fostering collaboration and participation from families and the community. Schools will proactively monitor students' wellbeing and academic needs to more equitably allocate resources and provide holistic support.

### Investing in Educators

All students will be supported by effective educators who demonstrate leadership and

commitment to enhancing  
student learning and development

Worcester will enhance its educator workforce by recruiting top candidates from diverse backgrounds and supporting current educators through training and instructional support in social-emotional learning, integrated instruction with technology, and cultural competence.

### Technology & Operations

All students will learn in an efficient and fiscally sound district

Worcester will come together as a city, community, and school district to prioritize and support success for all students. This includes more public participation in school policy discussions and new strategies to advocate for state funding.

### **Superintendent Position**

The Superintendent is the executive for the School Committee in all matters relating to the powers and duties of the School Committee. S/he has the sole authority to make appointments and promotions for all school system positions.

The Worcester Public School system is governed by a six-member elected school committee chaired by the Mayor of Worcester. Committee members are elected to a two year term and do earn a salary.

The School Committee is charged with hiring, supervising, evaluating, and paying the superintendent. It also has the authority to develop educational, personnel, managerial and financial policies for the school system and to adopt balanced operating and capital budgets annually.

The Superintendent has the obligation to implement the policies and budget of the school district.

It is essential that the Superintendent demonstrate: a) educational leadership; b) administrative and leadership skills; and c) the ability to communicate and interface effectively with the Worcester community and its institutions. A specific job description will be developed.

### **Comparative Evaluation Criteria**

Proposals meeting the minimum criteria will be further evaluated based on the comparative criteria noted below. Proposals shall include a narrative and other information demonstrating the proposer's experience and knowledge with respect to these criteria.

All Technical Proposals will be given an overall ranking based on individual rankings of the following criteria: Proposer's Experience, Proposer's Capacity, Key Personnel, Proposer's Approach to Ensuring Community Involvement, Proposer's Implementation

Plan and Schedule, Proposer's Recruitment Materials, Proposer's Networking Strategies, Proposer's Executive Search Tailored to District, and References.

The Worcester School Committee and/or their designees may invite any Proposers whose Technical Proposals to be interviewed.

#### Proposer's Experience

**Highly Advantageous:** The Proposer has five (5) or more years experience in conducting successful executive searches with public school systems, other educational institutions, and other non-profit organizations, and during the past five (5) years has concluded at least three (3) successful searches for a School Superintendent in Massachusetts, one (1) of which must have been for a district of similar size and demographics as Worcester.

**Advantageous:** The Proposer has at least three (3) years experience in successful executive search and hiring processes and has concluded at least two (2) successful executive searches for Superintendents with Massachusetts public school systems.

**Not Advantageous:** The Proposer has fewer than three (3) years experience in successful executive search and hiring processes and has concluded only one (1) successful executive searches for a Superintendent.

**Unacceptable:** The Proposer has fewer than three (3) years experience in executive search and hiring processes and has not concluded any successful executive searches for a Superintendent.

#### Proposer's Relevant Experience:

**Highly Advantageous:** The key personnel identified by the Proposer to work with the Public Schools of Worcester School Committee has five (5) or more years of consulting experience in conducting superintendent searches.

**Advantageous:** The key personnel identified by the Proposer to work with the Public Schools of Worcester School Committee has at least three (3) years but less than five years of consulting experience in conducting superintendent searches.

**Not Advantageous:** The key personnel identified by the Proposer to work with the Public Schools of Worcester School Committee has conducted at least one search but has less than three (3) years of consulting experience in conducting superintendent searches.

**Unacceptable:** The key personnel identified by the Proposer to work with the Public Schools of Worcester School Committee has no experience in conducting superintendent searches.

#### Proposer's Capacity

Highly Advantageous: The Proposer has more than five (5) consultants on staff to perform Superintendent's searches.

Advantageous: The Proposer has more than two (2) consultants on staff to perform executive searches.

Not Advantageous: The Proposer has two (2) consultants on staff to perform executive searches.

Unacceptable: The Proposed has only one (1) consultant on staff to perform executive searches.

#### Proposer's Demonstrated Success:

Highly Advantageous: The Proposer's references demonstrate that five (5) or more superintendents hired as a result of their efforts remained in the hiring district for at least 3 years. The Proposer has a track record of placing diverse candidates in top educational leadership positions, superintendent or otherwise (e.g., an education nonprofit CEO).

Advantageous: The Proposer's references demonstrate that three (3) or four (4) superintendents hired as a result of their efforts remained in the hiring district for at least three years. The Proposer has a track record of placing diverse candidates in top educational leadership positions, superintendent or otherwise (e.g., an education nonprofit CEO).

Not Advantageous: The Proposer's references demonstrate that one (1) or two (2) of the superintendents hired as a result of their efforts remained in the hiring district for at least three years.

Unacceptable: The Proposer is unable to demonstrate that any of the superintendents hired as a result of their efforts remained in the hiring district for at least three years.

#### Evaluation of the Proposed Plan:

Highly Advantageous: The proposal contains a clear and comprehensive plan that addresses all the objectives stated in the Scope of Service and Proposal Submission Requirements.

Advantageous: The proposal contains a clear plan that addresses most of the project objectives stated in the Scope of Service and Proposal Submission Requirements.

Not Advantageous: The proposal does not contain a clear plan.

Unacceptable: The proposal fails to meet the objectives stated in the Scope of Service and Proposal Submission Requirements.

## Proposer's Approach to Ensuring Community Involvement

Highly Advantageous: The Proposal provides more than three (3) project examples where the proposed Lead Consultant for Public Schools of Worcester Superintendent Search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a School Superintendent.

Advantageous: The Proposal provides three (3) project examples where the Proposer Lead Consultant for Public Schools of Worcester Superintendent Search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a School Superintendent.

Not Advantageous: The Proposal provides fewer than three (3) project examples where the Proposer Lead Consultant for Public Schools of Worcester Superintendent Search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a School Superintendent.

Unacceptable: The Proposal provides fewer than three (3) project examples where the proposed Lead Consultant has organized, trained and facilitated working groups as part of an executive search process, none of which has led to the hiring of a School Superintendent.

## Proposer's Implementation Plan and Schedule

Highly Advantageous: The Proposal includes a detailed description and examples of previously successful recruitment strategies and includes a clearly delineated timeline with specific milestones for Worcester's Superintendent search.

Advantageous: The Proposal includes an outline of some candidate recruitment strategies and an implementation plan that includes some milestones for Worcester's Superintendent search.

Not Advantageous: The Proposal lacks specific candidate recruitment strategies or specific milestones for Worcester's Superintendent search.

Unacceptable: The Proposal does not include any information about a proposed implementation plan and schedule.

## Proposer's Recruitment Materials

Highly Advantageous: The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least five (5) different Superintendent searches with the proposal, at least one (1) of which involves a Superintendent search in Massachusetts.

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Advantageous: The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least three (3) different executive searches with the proposal, at least one (1) of which involves a Superintendent search.



Not Advantageous: The Proposer includes three (3) or fewer samples of advertisements, brochures, and other forms of candidate outreach with the proposal, none of which involve a Superintendent search.

Unacceptable: The Proposer does not include samples of advertisements, brochures or other forms of candidate outreach.

#### Proposer's Networking Strategies

Highly Advantageous: The Proposal provides more than three (3) examples of how the Proposer's established networks of professional education contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

Advantageous: The Proposal provides three (3) examples of how the Proposer's established networks of professional education contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

Not Advantageous: The Proposal provides fewer than three (3) examples of how the Proposer's established networks of professional education contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

Unacceptable: The Proposal does not include specific examples of networks the Proposer will use in the search and recruitment process.

#### Proposer's Executive Search Tailored to District

Highly Advantageous: The Proposal provides more than three (3) examples of executive search and recruitment work showing how each planning model specifically met the needs of the particular entity with whom they were working, with at least one (1) of these examples leading to the hiring of a School Superintendent.

Advantageous: The Proposal provides three (3) examples of executive search and recruitment work showing how each planning model specifically met the needs of the particular entity with whom they were working with at least one (1) of these examples leading to the hiring of a School Superintendent.

Not Advantageous: The Proposal provides fewer than three (3) examples of executive search and recruitment work showing how each planning model specifically met the needs of the particular entity with whom they were working with at least one (1) of these examples leading to the hiring of a School Superintendent.

Unacceptable: The Proposal provides no specific examples of executive search and recruitment work related to the hiring of a School Superintendent or educational executive.

#### References - Executive Search Process and Action Plan

#### Planning Model Specificity:

One member of the Evaluation Committee (or designee) will check five (5) references of selected Proposers and will be asking the same questions of each to verify that prior Executive Search Processes and Action Plans showed how each planning model specifically met the needs of the particular entity with whom they were working.

Highly Advantageous: All five (5) references confirmed that prior executive search processes and action plans met the needs of the entity with whom they were working.

Advantageous: Four (4) references confirmed that prior executive search processes and action plans met the needs of the entity with whom they were working.

Not Advantageous: Fewer than four (4) references confirmed that prior executive search processes and action plans met the needs of the entity with whom they were working.

Unacceptable: The Proposal provides no references confirming that prior executive search processes and action plans met the needs of the entity with whom they were working.

#### Organizing and Facilitating Projects:

One member of the Evaluation Committee (or designee) will check five (5) references of selected Proposers and will be asking the same questions of each to determine prior success in organizing and facilitating projects where the proposed Lead Consultant for the Worcester Superintendent Search, organized, trained, facilitated and communicated among members of working groups as part of an executive search process experiencing successful results.

Highly Advantageous: All five (5) references confirmed that the Lead Consultant was successful in organizing, training, facilitating and communicating among members of working groups as part of an executive search process experiencing successful results.

Advantageous: Four (4) references confirmed that the Lead Consultant was successful in organizing, training, facilitating and communicating among members of working groups as part of an executive search process experiencing successful results.

Not Advantageous: Fewer than four (4) references confirmed that the Lead Consultant was successful in organizing, training, facilitating and communicating among members of working groups as part of an executive search process experiencing successful results.

Unacceptable: The Proposal provides no references confirming that the Lead Consultant was successful in organizing, training, facilitating and communicating among members of working groups as part of an executive search process experiencing successful results.

### Timeliness:

One member of the Evaluation Committee (or designee) will check five (5) references of selected Proposers and will be asking the same questions of each to confirm that all tasks were completed within the time frames required.

Highly Advantageous: All five (5) references confirmed that all tasks were completed within the time frame required.

Advantageous: Four (4) references confirmed that all tasks were completed within the time frame required.

Not Advantageous: Fewer than four (4) references confirmed that all tasks were completed within the time frame required.

Unacceptable: The Proposal provided no references confirming that all tasks were completed within the time frame required.

### Overall Project Satisfaction:

One member of the Evaluation Committee (or designee) will check five (5) references of all Proposers and will be asking the same questions of each to determine overall satisfaction.

Highly Advantageous: All five (5) references reported overall satisfaction with the work performed by the Proposer.

Advantageous: Four (4) references reported overall satisfaction with the work performed by the Proposer.

Not Advantageous: Fewer than four (4) references reported overall satisfaction with the work performed by the Proposer.

Unacceptable: The Proposal provides no references reporting overall satisfaction with the work performed by the Proposer.

### Evaluation of Presentation

The Evaluation Committee may schedule interviews with any Proposer.

Interviews will be ranked as follows:

Highly Advantageous: Lead Consultant for this project was present, clearly stated a plan of action, demonstrated excellent communications skills, presented other personnel with experience and skills who will be assigned for the duration of this project and successfully responded to all questions from the Evaluation Committee.

Advantageous: Lead Consultant for this project was present, outlined a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project and successfully responded to most of the questions from the Evaluation Committee.

Not Advantageous: Lead Consultant for this project was present but did not present a plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project and/or would not be assigned for the duration of this project or did not successfully respond to questions from the Evaluation Committee.

Unacceptable: Lead Consultant for this project was not present and did not present a plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project and/or would not be assigned for the duration of this project or did not successfully respond to questions from the Evaluation Committee.

Presentation:

Highly Advantageous: The Proposer's presentation was clear, well organized and demonstrated both effective communication skills and an understanding of the particular needs of the Worcester Public Schools community.

Advantageous: The Proposer's presentation was clear, well organized and demonstrated effective and sensitive communication skills.

Not Advantageous: The Proposer's presentation was disorganized or did not demonstrate effective communication skills.

Unacceptable: The Proposer's presentation demonstrated a clear lack of communication skills.

## **References**

**Highly Advantageous** – The proposal includes more than 10 references from previous clients, all of which would recommend the consultant for similar services.

**Advantageous** – The proposal includes 6 - 10 references from previous clients, the majority of which would recommend the consultant for similar services

**Not Advantageous** – The proposal includes 5 references from previous clients with at least 3 recommending the consultant for similar services

## **Interview / Oral Presentation of Services (if applicable)**

**Highly Advantageous** – The proposer's presentation was conducted by the individuals who will perform the services and included thorough, highly detailed information regarding how the firm will complete the scope of services. The presentation included relatable examples and dialog from services performed for other similar municipalities.

**Advantageous** – The proposer's presentation was conducted by some of the individuals who will perform the services and included adequately detailed information regarding how the firm will complete the scope of services. The presentation included one relatable example and dialog from services performed for other similar municipalities.

**Not Advantageous** – The proposer’s presentation was conducted by the firm’s sales team and not the individuals who will perform the services. It includes some information regarding how the firm will complete the scope of services, but was not clear as to the firm’s ability to comply with the stated scope of services. The presentation included no examples and dialog from services performed for other similar municipalities.

### **Ad Hoc Committee Membership**

- Chairwoman, Molly O. McCullough, Worcester School Committee
- Dianna Biancheria, Worcester School Committee
- Tracy O’Connell Novick, Worcester School Committee

REQUEST FOR PROPOSALS / RFP #: \_\_\_\_\_ ~ PRICE PROPOSAL  
Executive Search Consultant – Superintendent of Schools - City of Worcester

The price quoted below includes the cost of all labor, materials, insurance, and all other necessary expenses to fulfill the conditions of the contract. The city will not pay any expenses that are not listed in the price proposal below.

The undersigned hereby proposes to furnish all necessary services required for Executive Search Consultant for the Superintendent of Schools in the City of Worcester, all in accordance with our attached technical specifications and our submitted price proposal as noted below. The total cost to be paid to the consultant will not exceed the "Total Cost for Recruitment" line listed below so please add in all expenses. For the purposes of this bid, the anticipated salary for the position will be \$200,000.

<b>Options for Costing:</b>	
Professional fee per recruitment (percentage of position salary at \$ 200,000.00)	%
<b>or</b>	
Fixed fee per recruitment	\$
<b>Ancillary costs: (per search)</b>	
Other Expenses ( please list)	
a.	\$
b.	\$
c.	\$
d.	\$
Total Ancillary costs:	\$
<b>Total Cost for Recruitment</b>	\$

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Name of Company Making Proposal

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Signature of Individual Submitting the Proposal

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Title: