



Christopher J. Gagliastro, MCPPO
Purchasing Agent

RFP NO. 7805-W2
ISSUANCE DATE: 4/7/22

BUYER: Christopher J. Gagliastro, MCPPO

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

RFP TITLE: Consultant – Culture & Climate Survey / 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 professional consulting services for a culture and climate survey as per the attached requirements and specifications of the City of Worcester Public Schools.**
2. 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.
3. 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
4. A performance bond in the amount of not applicable 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. Performance bond shall be on the City's form only.

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. No changes will be considered nor will 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**

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" or "Respondent" 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 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 as outlined in Section IV. INSURANCE REQUIREMENTS of this RFP.
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, setoffs, or counterclaims 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 Technical Proposal evaluation requirements before considering costs. *Therefore, no reference to pricing may be made in the Technical Proposal.*

A sealed package containing **the original and 3 copies** of the proposal **must** be labeled as follows:

Purchasing Agent, City of Worcester

Consultant – Culture & Climate Survey / WPS – Technical Proposal

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

Re: RFP No. 7805-W2

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

Purchasing Agent, City of Worcester

Consultant – Culture & Climate Survey / WPS – Price Proposal

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

Re: RFP No. 7805-W2

PRICE PROPOSAL PAGE IS LOCATED AT END OF SPECIFICATIONS

Proposals must be delivered no later than Wednesday, May 4, 2022 at 10:00 AM LOCAL TIME. *Late submissions will be rejected, regardless of circumstances.* The City 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 use of four (4) 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 price 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 price 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

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> |
| _____ | | |
| _____ | | |
| _____ | | |
| 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.

- **Proposers must sign and submit the above form with their proposal submission.**

I. INTRODUCTION

The City of Worcester, Massachusetts ("City"), with a population of 182,000, 5,700 employees, and 25,000 students, including the Worcester Public Schools (WPS), is seeking proposals from qualified vendors who will provide a tool, support the logistical administration, and have a platform for visualizing results of a Culture and Climate Survey for an urban school district. The services are for School Year 2023, which runs from July 1, 2022 through June 30, 2023.

II. SCOPE OF SERVICES

The vendor retained through this request for proposals will be required to perform the following scope of services:

1. Provide a culture and climate survey to approximately 20,000 students in grades 3 through 12, approximately 2,600 teachers and staff in grades pre-kindergarten through 12, and approximately 15,500 families of students in grades pre-kindergarten through 12. The survey must contain the following dimensions and should be able to be administered multiple times per year:
 - a. Culture, equity, diversity and inclusion
 - b. Engagement
 - c. Environment
 - d. High academic expectations
 - e. Self-efficacy
 - f. Academic effort
 - g. Grit and resilience
 - h. Positive relationships
 - i. Safety
 - j. Sense of connectedness/belonging
 - k. Well-being and Social-Emotional Learning
 - l. Post-secondary planning
 - m. Demographics and contextual/background questions
2. Jointly plan, manage and monitor survey administrations with the District's Office of Research and Accountability.
3. Have a platform to display and visualize the data from the surveys over time and by various student subgroups. School personnel should have access to the platform and it should be accessible to school personnel and students through CLEVER.
4. Individual-level survey results must be available to the District's Office of Research and Accountability after each administration.

The expected timeline for delivery of this project is July 1, 2022 through June 30, 2023.

III. PROPOSAL SUBMITAL REQUIREMENTS

Submitted proposals must contain the following mandatory information used as part of the selection criteria.

Minimum Evaluation Criteria

All proposals must satisfy all of the minimum criteria below for further evaluation. Proposals shall include information demonstrating compliance with each of these criteria. Proposals that do not meet the minimum criteria will not be further evaluated.

The vendor responding to this request for proposals must submit a proposal that includes:

1. Executive Summary:

Provide an overall description of your organization including year established, size, location, etc.

2. Qualifications and Experience:

Please note: The proposed vendor must have a minimum of five (5) years' experience providing and supporting survey administration for public sector clients.

Provide a detailed description of your qualifications and experiences relative to the scope of work including, but not limited to, the following:

- Qualifications, experience and capacity of the applicant (and staff) that will work on the project;
- Experience developing comprehensive culture and climate and other surveys;
- Experience planning and supporting survey administration with urban school districts;
- Experience producing dashboards, visualizations and reports for consumption by school districts, students and parents; and
- A summary of any prior experience working with Worcester Public Schools.

3. Quality of Culture and Climate Survey and Dashboard:

Provide an example of the vendor products that would be used that includes, but is not limited to, the following:

- Culture and climate survey questions organized by domains and by user groups (students grades 3-12, teachers and staff in grades pre-kindergarten through 12, families of students in grades pre-kindergarten through 12);
- Methodology used and psychometrics for domain scales and other technical data to support the cohesion of the items in the identified domains;
- Views of the dashboard(s) or visualizations (with subgroup disaggregation) for seeing and using survey results by school staff and district central office;

4. Quality of Project Management Plan:

Provide a project management plan describing how the vendor will work with WPS to plan and support implementation of the survey and posting of results:

- Process and approach to managing this project with an urban school district;
- Outline of a proposed meeting schedule with district points of contact and staff;
- Description of expectations for communication with WPS in executing the work;
- Process for presenting and reporting results to WPS and others; and
- Detailed timeline of proposed activities associated with planning and supporting implementation and posting results.

5. Examples of Similar Projects with References:

Provide a minimum of three (3) examples of survey projects performed in the past eight (8) years with public sector organizations including any projects completed with WPS in that time. A minimum of one (1) of the three (3) examples must be from a local education agency; preferably an urban school district. Include the names of the organizations, a contact person and contact information.

Company Ownership/Management

Should there be a change in the awarded vendor ownership or management, the contract may be canceled by WPS unless a mutual agreement is reached with the new owner or manager to continue the contract with its present provisions and pricing.

Comparative Evaluation Criteria

Each proposal meeting the Minimum Evaluation Criteria shall be further evaluated and rated according to the Comparative Evaluation Criteria in order to determine the relative merits of each proposal. The review will cover the criteria listed below. Within each category, the degree to which the proposal satisfies the stated criteria shall be reviewed and rated on a system of "Highly Advantageous," "Advantageous," and "Not Advantageous."

Proposals will be compared on the following criteria:

1. **Qualifications.**

Highly Advantageous: The proposer possesses superior qualifications demonstrated by ten (10+) or more years of experience successfully providing and supporting survey administration appropriate for an urban educational context.

Advantageous: The proposer possesses adequate qualifications demonstrated by six to nine (6-9) years of experience successfully providing and supporting survey administration appropriate for an urban educational context.

Not Advantageous: The proposer meets the minimum qualifications demonstrated by five (5) years of experience successfully providing and supporting survey administration appropriate for an urban educational context.

2. **Culture & Climate Survey and Dashboard.**

Proposals should demonstrate an understanding of the scope of work as well as the capability to provide the services that meet the proposal requirements.

Highly Advantageous: The proposed survey and dashboard provide a clear and comprehensive set of questions and visualizations for various audiences that will be needed for the scope of this project.

Advantageous: The proposed survey and dashboard provide an adequate set of questions and visualizations for various audiences that will be needed for the scope of this project.

Not Advantageous: The proposed survey and dashboard provide a partial and/or misaligned set of questions and visualizations for various audiences that will be needed for the scope of this project.

3. **Project Management Plan.**

Proposals should demonstrate an understanding of the activities needed to execute the scope of work and services that meet the proposal requirements.

Highly Advantageous: The project management plan provides a clear and comprehensive set of processes, approach, activities and timeline to execute the scope of this project.

Advantageous: The project management plan provides an adequate set of processes, approach, activities, and timeline to execute the scope of this project.

Not Advantageous: The project management plan provides an unclear and/or partial set of processes, approach, activities, and timeline to execute the scope of this project.

4. **Prior Experience and References.**

Proposals should demonstrate past performance by including examples of prior experiences working with local education agencies (i.e., school districts).

Highly Advantageous: The proposer has prior survey administration and results dashboard publication experience in collaboration with several similar sized urban school districts.

Advantageous: The proposer has prior survey administration and results dashboard publication experience in collaboration with at least one urban school district.

Not Advantageous: The proposer has prior survey administration and results dashboard publication experience in collaboration with a local education agency (i.e., school district).

Review Committee

Proposals will be reviewed and scored by the Director of the Office of Research and Accountability, the district Research and Evaluation Specialist in the Office of Research and Accountability, and a representative from the District's Grants Office.

IV. COST / PRICE PROPOSAL

Submitted proposals must contain a budget that outlines annual costs for the proposed services. Proposer must also complete and submit the COST / PRICE PROPOSAL sheet.

COST / PRICE PROPOSAL
(To be completed by proposer)

RFP#: _____

Consulting fee must be submitted as a flat, lump sum fee for all tasks/deliverables in the attached scope of services and required under the contract for the entirety of the project. Please include any and all costs associated in the lump sum fee. No additional fees will be considered. Proposers may not add additional items.

Sum Fee / Total Cost: \$_____

Signature of person
submitting proposal:

Date: _____

Printed Name: _____

Title: _____

Company: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____