



The City of  
**WORCESTER**

Administration & Finance – Purchasing Division  
Christopher J. Gagliastro, MCPPO – Purchasing Director  
455 Main Street, Room 201, Worcester, MA 01608  
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[www.worcesterma.gov](http://www.worcesterma.gov)

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

**RFP NO.: 7826-W2**  
**ISSUANCE DATE: 6/1/2022**

**BUYER: Christopher J. Gagliastro**

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

**RFP TITLE: Consultant - Executive Search Firm – City Manager Search / City Clerk**

***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 City Manager as per the attached requirements and specifications of the City Council of The City of Worcester.**
2. A certified check or bid bond made payable to the "City Treasurer, City of Worcester" in the amount of Not applicable 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, 30
4. 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 Firm – City Manager Search / City Clerk – Technical Proposal**

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

**Re: RFP No. 7826-W2**

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

**Purchasing Agent, City of Worcester**

**Consultant - Executive Search Firm – City Manager Search / City Clerk – Price Proposal**

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

**Re: RFP No. 7826-W2**

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

**Proposals must be delivered no later than Wednesday, June 29, 2022 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.***

**REQUEST FOR PROPOSALS FOR EXECUTIVE SEARCH FIRMS - CITY  
MANAGER SEARCH  
05/24/2022**

**City of Worcester Overview**

A robust, vibrant city in the heart of the Commonwealth of Massachusetts, Worcester combines the warmth of a small town and the convenience of a thriving city. As the second largest city in New England, Worcester boasts diverse neighborhoods, distinguished colleges and cultural institutions, and a proud history of innovation and enterprise. With its close proximity to Boston, MA, Springfield, MA, Providence, RI, and Hartford, CT, Worcester is at a crossroads, providing unique opportunities for growth and development.

The City is governed by a Council-Manager, or *Plan E*, form of government with a popularly elected Mayor, 11 City Council Members and a City Manager. The City Council is the legislative body of the city and has the authority to hire a City Manager, the City Auditor and the City Clerk.

Pursuant to the Plan E Charter (M.G.L.c.43, §104), the City Manager has broad authority “to act as chief conservator of the peace within the city; to supervise the administration of the affairs of the city; to see that within the city the laws of the commonwealth and the ordinances, resolutions and regulations of the city council are faithfully executed; and to make such recommendations to the city council concerning the affairs of the city as may to him seem desirable; to make reports to the city council from time to time upon the affairs of the city; and to keep the city council fully advised of the city's financial condition and its future needs.” The City Manager serves as the Chief Executive Officer of the City responsible for appointing, removing and overseeing virtually all City employees (with the most notable exception being School Department employees), and for appointing citizens to boards and commissions. The City Manager works closely with the City Council and prepares and presents the annual City budget to the City Council.

City Manager Edward M. Augustus, Jr. was appointed as the City Manager of Worcester, Massachusetts in January 2014. City Manager Augustus announced his resignation in March 2022 and will be replaced by an acting city manager Eric D. Batista starting on June 1, 2022.

**Introduction**

The City of Worcester seeks to contract with an executive search firm to conduct a comprehensive search for the position of City Manager.

The City of Worcester is accepting proposals from consultants experienced in city manager searches in accordance with M.G.L. Chapter 30B.

It is the consensus of the Worcester City Council that this process should strive to attract the strongest, most diverse pool of candidates possible. The Council should be kept informed throughout the recruitment process, and the consultants should ensure their availability to provide information and answer questions, and details of the process, such as placement of advertising, and applications received or discussed, in regular updates via electronic communication.

### **Scope of Services**

The City Council of Worcester is seeking a collaborative executive search firm to work with the City Council and the community in recruiting a new City Manager. The contract will begin when approved by the City Council. This contract will continue until all negotiations with the successful City Manager candidate are completed and the employment contract is signed.

### **Communication**

- The Consultant shall work collaboratively with the City Council throughout the process, and keep the Council informed about what is occurring at each stage. The consultant shall also support the Council in keeping the community informed via regular brief written updates.
- The Consultant will coordinate or provide the city an up-to-date and maintained website for community information and updates about the search process.

### **Document Development**

- Assist the City Council in developing descriptive documents for prospective applicants, including requirements, submissions, and timelines.

### **Position assessment, position announcement and brochure development**

The consultant will be required to perform all necessary search services including:

- Interview City Council members and selected members of the Worcester community to develop an understanding of the personal and professional characteristics sought in a new City Manager. The search firm shall select, after consultation with the Mayor and City Council, individuals to be interviewed.
- After consultation with the Mayor and City Council, develop and recommend a formal process and timetable to complete the search.

- Work with the Mayor and City Council to Organize, publicize, and facilitate community listening sessions and recommend a community involvement component designed to gather community input on candidates and to expose candidates to the resources and diversity of the community.
- Consultant shall create a dedicated email and website for the recruitment to solicit feedback.
- Consultant creates a recruitment-related communications plan, including the use of social media as a tool to engage the community in the recruitment process. Use of Social Media should be explained by the consultant in terms of how it will be used during the selection process.
- A formal job description will be created by consultant prior to initiation of the search process.

### **Advertising, Candidate Recruitment, and Outreach**

- Recommend method of advertising including publication, frequency and duration, and coordinate advertising. Advertising costs shall be included in the proposal price.
- Consultant shall place the position announcement in appropriate professional online publications, including International City and County Management Association, National Forum for Black Public Administrators, the International Hispanic Network, and other websites where potential candidates might look for career opportunities. In addition to public sector publications and websites, outreach should include LinkedIn and other private sector resources.
- Develop a diverse pool of qualified applicants represented by race, ethnicity and gender. The pool should be large enough to maximize choice by the Worcester City Council based upon assessment of need and desires of the Council and community.

### **Candidate Evaluation and Screening**

- Conduct screening of all qualified applicants including verification of credentials, references and experience and conduct background checks to determine compatibility for appointment.

- Consultant shall interview fifteen (15) of the most highly qualified candidates by Zoom to fully grasp their qualifications and experience, as well as their interpersonal skills. This is an hour-long interview, asking specific questions about their experience and skill set. This allows consultant to ask follow-up questions and probe specific areas. It also provides a sense of their verbal skills and their level of energy for, and interest in, the position.
- All resumes will be acknowledged, and contacts and inquiries from candidates will be personally handled by the consultant, ensuring the process is professional and well regarded by all who participate.
- Consultant will prepare a Recruitment Report that presents the credentials of eight (8) candidates most qualified for the position. A binder which contains the candidate's cover letter and resume shall be prepared, along with a "mini" resume for each candidate, so that each candidate's credentials are presented in a uniform way for an Executive Session interview session by a committee of the Worcester City Council.
- The City Council Screening Committee will conduct an interview of the 8 selected priority candidates, from which they shall select 3-5 Finalists for a public presentation to the full City Council. If the City Council decides that the selected Finalists are not sufficiently diverse or qualified, they may ask the City Council Screening Committee to present a different pool from the priority candidates.
- Once the 3-5 finalists are selected, Consultant will contact 5 references, along with verification of educational credentials, Criminal Court, credit, and motor vehicle and record checks. Using the candidate's name and work experience, consultant will review the top 200 search results available from Google, as well his/her activity (if publicly available) on Facebook, Twitter, and other social media platforms. Employment verification may also be requested. Consultant to further verify candidates' abilities, work ethic, management and leadership skills, analytical skills, interpersonal skills, ability to interact with the media, and any areas identified for improvement.
- Consultant will offer a community "Meet and Greet" option as a means for the community to interact with and get to know the finalists in an informal setting. At this "Meet and Greet," finalists would give a brief overview of themselves and answer questions from the audience.
- Consultant will also work with the Human Resource Department and the City Clerk to coordinate a tour of City of Worcester facilities, and interviews with department heads and elected officials.

- Consultants will be present for all of the interviews, serving as a resource and facilitator. They will also organize and coordinate all the travel, lodging and other logistics for the finalist during the community “Meet and Greet” and final city council public interviews.

### **Appointment of Candidate**

- Consultant will assist the City Council as much as requested with the salary and benefit negotiations and drafting of the employment agreement, if appropriate.
- Consultant will notify all applicants of the final appointment, including professional background information on the successful candidate.

### **Recruitment Schedule**

A detailed recruitment schedule should be provided to the Worcester City Council.

The city council committee should receive regular reports from the Consultant and monitor the timetable to ensure any approvals that may be needed are granted. The recruitment and selection process should be expected to take between 18 – 26 weeks from the time the contract is signed until the candidate is appointed. Consultant should be prepared to work with the City on a longer process, if that is desired by the City Council.

The overall process should strive to achieve the following milestones and deliverables:

(Weeks 2-10) On-site interviews of Worcester City Councilors and staff, development and approval of recruitment brochure.

Deliverables: Recruitment Brochure.

(Weeks 11-16) Placement of professional announcements, candidate identification, screening, interview and evaluation by consultant.

(Weeks 17-18) Consultant recommendation to Preliminary Screening Committee of qualified candidates.

Screening Committee conducts interviews in this period.

Deliverables: Recruitment Report, including suggested questions and evaluation sheets.



(Week 19-20) Selection of candidate finalists by for Council; additional background and reference checks, report preparation and presentation.

Deliverables: interview reports, including suggested questions and evaluation sheets.

(Weeks 21-26) Interviews of selected finalist candidates; Council selection of final candidate; negotiation, offer, acceptance and appointment.

The City Manager search process should allow sufficient time for stakeholder input, recruitment, preliminary candidate reviews, discussions with the Screening Committee, interviews by the Screening Committee, the decision and then presentation of the finalists to the City Council, two rounds of Council interviews, the meet and greets, city tours, and the final decision of the City Council.

### **Mandatory Submissions / Minimum Criteria**

In order to qualify for an award of a contract pursuant to the requirements of this RFP, the consultant must provide the following. Failure to satisfy any of the below will result in proposal disqualification.

1. Demonstrate broad experience and success in recruiting city managers, the same as or similar to the demographics and government structure of the City of Worcester. Experience must be demonstrated in serving a minimum of three cities in similar size as Worcester. Submission must include a listing of all similar services provided in the previous three years with contact names, telephone and e-mail addresses. Five (5) references and five (5) letters of recommendation from previous clients are required to be included in submission.
2. Demonstrate capacity and experience in generating necessary advertisements to local and national media. A minimum of three samples of same must be included with submission.
3. Demonstrate ability and experience in conducting a broad executive search that will not exceed a period of 90 days from date of contract execution.
4. Provide a comprehensive plan of services. The plan of services shall contain specifics as to how the consultant will satisfy the scope of services, including but not limited to:
  - Approach to meeting the project scope of services

- Listing/samples of other relevant plans of services and implementations completed for similar municipalities.
- Description and resumes of the project manager and/or other employees assigned to the project. Project manager and other employees assigned must be identified in submission and may not be altered following contract award unless approved by the City.
- Proposed timeline.
- Services proposed in addition to the scope of services offered by consultant for the project.

## **Comparative Criteria**

Each proposal meeting the Minimum Evaluation Criteria above 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 objectives listed below. Within each category, the degree to which the proposal satisfies the stated objective shall be reviewed and rated on a system of "Highly Advantageous", "Advantageous" and "Not Advantageous".

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 the City, and References.

The Worcester City Council and/or their designees may invite any Proposers whose Technical Proposals to be reviewed.

### ***Proposer's Experience***

**Highly Advantageous:** The Proposer has five (5) or more year's experience in conducting successful executive searches with similar size cities, and during the past five (5) years has concluded at least three (3) successful searches for a City Manager in Massachusetts, one (1) of which must have been for a search of similar size and demographics as Worcester.

**Advantageous:** The Proposer has at least three (3) year's experience in successful executive search and hiring processes and has concluded at least two (2) successful executive searches for City Managers in Massachusetts.

**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 City Manager.

### ***Proposer's Relevant Experience:***

**Highly Advantageous:** The key personnel identified by the Proposer to work with the City and Towns and has five (5) or more years of consulting experience in conducting city manager/town manager searches.

**Advantageous:** The key personnel identified by the Proposer to work with the City Council has at least three (3) years but less than five years of consulting experience in conducting City Manager searches.

**Not Advantageous:** The key personnel identified by the Proposer to work with the City Council has conducted at least one search but has less than three (3) years of consulting experience in conducting City Manager searches.

***Proposer's Capacity***

**Highly Advantageous:** The Proposer has more than five (5) consultants on staff to perform City Manager searches.

**Advantageous:** The Proposer has more three (3) to four (4) consultants on staff to perform executive searches.

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

***Proposer's Demonstrated Success:***

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

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

**Not Advantageous:** The Proposer's references demonstrate that one (1) or two (2) of the City Managers 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.

### ***Proposer's Approach to Ensuring Community Involvement***

**Highly Advantageous:** The Proposal provides more than three (3) project examples where the proposed Lead Consultant for City Managers 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 City Manager.

**Advantageous:** The Proposal provides three (3) project examples where the Proposer Lead Consultant for City Manager 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 City Manager.

**Not Advantageous:** The Proposal provides fewer than three (3) project examples where the Proposer Lead Consultant for City Manager 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 City Manager.

### ***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 City Manager search.

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

**Not Advantageous:** The Proposal lacks specific candidate recruitment strategies or specific milestones for City Manager search.

### ***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 City Manager searches with the proposal, at least one (1) of which involves a City Manager search in Massachusetts.

**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 City Manager 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 City Manager search.

### ***Proposer's Networking Strategies***

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

### ***Proposer's Executive Search Tailored to Worcester***

**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 City Manager.

**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 City Manager.

**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 City Manager.

### ***Overall Project Satisfaction / References:***

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

Highly Advantageous: More than five (5) references confirmed that all tasks were completed within the time frame required and successful recruitments were conducted. References highly recommend the proposer.

Advantageous: The minimum of five (5) references confirmed that all tasks were completed within the time frame required and successful recruitments were conducted. References recommend the proposer.

Not Advantageous: The minimum of five (4) references confirmed that all tasks were completed within the time frame required. Recruitments were not completely successful. Some references recommend the proposer.

### ***Presentation (if requested by Council)***

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 City of Worcester 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.

### **Determination/Award**

The City Council reserves the right to reject any or all responses. The Council may negotiate the terms of the contract with the selected vendor prior to entering into a contract. The Council reserves the right to revise in part this Request. If the Council cancels or revises this Request, all respondents will be notified.

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 Council. 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 Council 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.



**Cost / Price Proposal Page**  
**To be submitted under separate envelope per RFP instructions**

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 City Manager 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.

<b>Options for Costing:</b>	
<b>Fixed fee recruitment</b>	\$
<b>Ancillary costs: (per search)</b>	\$
<b>Other Expenses ( please list)</b>	\$
a. \$	\$
b. \$	\$
c. \$	\$
d. \$	\$
Total Ancillary costs: \$	\$
Total Cost for Recruitment \$	\$ *

\*low proposal price to be based on the total amount