



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.: 8009-W3**  
**ISSUANCE DATE: 4/18/2023**

**BUYER: Christopher J. Gagliastro**

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

**RFP TITLE: Consultant - Executive Search Firm – Chief Equity Officer / CM**

***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 Chief Equity Officer as per the attached requirements and specifications of the Executive Office of the City Manager.**
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 – Chief Equity Officer / CM – Technical Proposal**

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

**Re: RFP No. 8009-W3**

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

**Purchasing Agent, City of Worcester**

**Consultant - Executive Search Firm – Chief Equity Officer / CM – Price Proposal**

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

**Re: RFP No. 8009-W3**

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

**Proposals must be delivered no later than Wednesday, May 10, 2023 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.***



# **CHIEF EQUITY OFFICER SEARCH FOR CITY OF WORCESTER**

Request for Proposals for Executive Search Firm



# **Chief Equity Officer Search for City of Worcester**

## **BACKGROUND**

Worcester is a city of approximately 206,000 residents located in the center of Massachusetts, between Boston and Springfield. Worcester, known as the “Heart of the Commonwealth,” was incorporated as a town in 1722 and as a city in 1848. It is the second most populous city in New England, following Boston. Worcester is approximately 40 miles west of Boston, 50 miles east of Springfield, and 40 miles north of Providence, R.I. The City has a total area of 38.6 square miles and is bordered by the communities of Auburn, Grafton, Holden, Leicester, Millbury, Paxton, Shrewsbury, and West Boylston.

The City of Worcester continues to further its reputation as a well-run, financially sound municipal organization. Worcester is governed by a Council-Manager, or Plan E, form of government with a popularly elected Mayor, 10 elected City Council members, and a City Manager appointed by the City Council. The Chief Equity Officer position is a representative of the City Manager’s Cabinet and reports directly to the City Manager.

A priority of the City of Worcester is to enhance the diversity in its workforce. The Executive Office of Diversity, Equity, and Inclusion (DEI) is dedicated to recruiting, hiring, including, developing, retaining, engaging, and motivating a diverse, results-oriented, high-performing workforce. The City Manager’s commitments are to:

- Accelerate representation within City workforce and leadership
- Increase access to opportunities through an equitable hiring process
- Provide DEI trainings and professional development opportunities
- Foster an environment where people with disabilities are included, empowered, and have access to support
- Advance equal pay for equal work
- Ensure diverse suppliers have equal opportunity to conduct business with the City

Worcester is seeking a dynamic and engaged Chief Equity Officer (EO) who can think strategically and knows how to motivate others. The EO is expected to lead a Department of at least eight (8) staff. Additionally, the EO will work closely with all departments and is accountable for the direction and success of Diversity and Inclusion programs through all departments/divisions. Preferred candidates will have the ability to lead through influence. The EO should know how to assist City employees in acquiring training, gaining new skills, and developing their careers. The EO will strive to increase the number of women and minorities who work for the City, so the workforce and volunteer positions truly represent the community they serve. The successful candidate must have excellent written and verbal communication skills, extensive problem-solving skills, and the ability to compile extensive Equal Employment Opportunity (EEO)/Affirmative Action (AA) data to ensure proper tracking and reporting, as well as the ability to study and analyze the barriers to diversifying the workforce, develop strategy

and plans to overcome those barriers, and train a large workforce on Diversity and Inclusion, Unintentional Biases, and Civility. The EO will also oversee Community-based services including responding to resident complaints alleging bias by the City and addressing Human Rights issues.

### PURPOSE AND OVERVIEW

The City of Worcester is seeking proposals from national executive search firms who specialize in searches for executive level positions and who are capable of assisting the City to identify and recruit a new **Chief Equity Officer**. It is anticipated that the successful finalist will begin onboarding in Fall 2023.

### SCOPE OF SERVICES

The City of Worcester is seeking proposals from search firms with extensive experience in conducting successful executive level searches in the government sector, with a proven ability to recruit highly qualified, diverse, and nationally-respected candidates. The selected firm will utilize industry best practices and protocol to customize a plan and overall process tailored to the City's needs, while helping to ensure a smooth and successful search process. The selected firm must have extensive experience successfully conducting Chief Equity Officer or Chief Diversity Officer executive searches. The City's Search Committee will consist of staff from the City Manager's Office and Human Resources Department.

#### **Scope of Services**

Duties and Responsibilities of the firm awarded this RFP shall include, but not limited to the following:

- **Work with and communicate to City staff and others.** Work with Search Committee through all phases of the Chief Equity Officer search and selection process. Provide regular updates to the Search Committee on timelines and search progress.
- **Develop a position profile.** Work with the City to cultivate a search profile for the Chief Equity Officer position, and support and assist in the development, advertisement, and disbursement of the position announcement.
- **Develop outreach plan and coordinate advertising.** Develop outreach plan identifying activities that will be utilized to recruit a diverse pool of candidates and containing specific benchmark activities that will be utilized in the recruitment process. Activities should include social media advertising.
- **Target outreach.** Engage in targeted outreach to Diversity, Equity, and Inclusion officers using appropriate technology, expertise, firm contacts, and candidate fora/questionnaires to identify candidates aligned to the selection criteria.
- **Identify a diverse group of applicants.** Identify a diverse pool of qualified candidates that includes national, regional, in-state, and local candidates, from those actively pursuing a job change as well as those who may not be in the job market to ensure a

diverse pool of innovative leaders.

- **Engage stakeholders in the recruitment process.** Develop a plan for engaging stakeholders from the Worcester community, which may include conducting in-person or virtual meetings, managing a web site, and social media outreach.
- **Candidate landing page.** Use the City of Worcester's tracking system or develop a landing page to host candidates' complete questionnaires and resumes that is password protected and accessible to designated staff of the Search Committee.
- **Accurate recordkeeping.** Maintain accurate recordkeeping for all aspects of the search. All information on the candidates will become the property of the City of Worcester.
- **Screen candidates and provide profiles.** Screen and interview candidates as appropriate to ascertain the suitability of potential candidates. Provide to the Search Committee at least ten (10) candidate profiles, including written materials submitted by the candidates, preliminary references, background reports, potential conflicts of interest, and other available and relevant information.
- **Candidate interviews and assessments.** Support and assist the Search Committee during all candidate interviews. Arrange candidate interviews, design interview questions and interview evaluation materials, prepare the Search Committee for interviews, execute the interview process, and assist in the assessment process.
- **Perform reference and background checks on top candidates.** Provide in-depth references and background checks for finalist candidates including candidate litigation history and publicly available websites.
- **Final selection of candidate.** Support and assist the Search Committee with final selection, negotiations with the selected candidate, and drafting employment agreement and terms and conditions with the finalists.
- **Failed Search.** Provide a plan for mitigating a failed search.

#### **Applicant and Candidate Contact**

- Assist with agenda and schedule coordination for semi-finalists (10-12) and finalists (3-4) virtual candidate interviews, to include briefing of candidates prior to and after the interview.
- Maintain frequent and effective communication with applicants in order to keep them engaged in the process.
- Obtain candidate permission to conduct thorough reference and background investigations.
- Notify all nominators and applicants of the final hiring decision.

**The City of Worcester shall provide:**

- A position description for the Chief Equity Officer
- A designated Human Resources representative to work with the successful Firm.

**Contract Term**

The anticipated period of performance of the contract, if one is awarded, will begin immediately and will run through start date of successful candidate.

**INFORMATION TO BE SUBMITTED WITH PROPOSAL**

- Cover letter expressing desire to be considered for the opportunity and demonstrating an understanding of the particular requirements of the Scope of Services required.
- Description of experience with similar projects, including successful recruitment experiences of senior executive level Diversity, Equity, and Inclusion positions preferably with other government and municipal clients and examples of strategic or creative approaches to recruiting candidates.
- A proposed approach for the Scope of Services including timeline to complete scope.
- At least three comparable client references with contact information, preferably in government.
- A firm and fixed project maximum cost, incorporating all costs to be charged for performing the tasks necessary to accomplish the objectives of the contract. Price Proposal page is located at the end of these specifications.
- Project Lead: State the name, title or position, and telephone number of the individual who will have primary responsibility for the project. Describe the experience and qualifications of the Project Lead (resume).

**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. Consultant shall have been in business for no less than five (5) years in advising municipalities on selecting department head positions or managerial positions, with at least five (5) successful engagements within the Northeastern United States



(Connecticut, Maine, Massachusetts, New Jersey, New York, New Hampshire, Rhode Island, Vermont),.

2. Consultant shall have successfully performed at least two (2) executive recruitment/selection services for an executive management level position within Massachusetts municipalities.
3. Consultant shall have extensive experience conducting recruitment/selection services for executive positions, both nationally and locally with a proven track record of employing creative strategies and research techniques — as well as using a variety of channels and methods — to identify, attract, and recruit potential candidates who might not otherwise be aware of the opportunity presented. Use of an equity lens to guide search process/procedures/policies.
4. Consultant shall have documented experience providing a highly qualified and diverse candidate pool from which to select new executive managers.
5. Consultant shall have demonstrated experience working with municipal government organizations.
6. Consultant shall present evidence that it has Professional Liability insurance policies to which Worcester can be added as an additional insured.

Consultant shall demonstrate that it has a Project Lead to work with the City on this recruitment project from start to finish. The senior consultant assigned to the search must have the background, skills, and abilities to facilitate a successful search and can effectively and appropriately represent the City to key City stakeholders and potential candidates.

7. Consultant must be available for this project immediately upon the award of a contract.

***Proposals that do not meet the minimum criteria will not be considered for further evaluation.***

## **B. 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.

### **Experience of the Consultant**

The City seeks a Consultant with demonstrated experience in conducting nationwide government executive searches for Chief Equity Officers, Chief Diversity Officers, Vice Presidents for Diversity, Equity, and Inclusion, or similar titles for government institutions similar in size, scope, complexity, and structure to the City of Worcester.

**Highly Advantageous** - The proposer has demonstrated that it has more than ten (10) years of experience in conducting successful nationwide government executive searches for Chief Equity Officers, Chief Diversity Officers, Vice Presidents for Diversity, Equity, and Inclusion, or similar titles

**Advantageous** - The proposer has demonstrated that it has between six (6) and ten (10) years of experience in conducting successful nationwide government executive searches for Chief Equity Officers, Chief Diversity Officers, Vice Presidents for Diversity, Equity, and Inclusion, or similar titles.

**Not Advantageous** - The proposer has demonstrated the minimum of five (5) years of experience in conducting successful nationwide government executive searches for Chief Equity Officers, Chief Diversity Officers, Vice Presidents for Diversity, Equity, and Inclusion, or similar titles

### **Qualifications of the Consultant**

The City is seeking a consultant that has extensive and significant qualifications for the work described in the Scope of Services. Proposals shall include any and all information about the consultant's qualifications that demonstrate a high level of knowledge on the subject scope.

**Highly Advantageous** - The proposer has superior qualifications, resources, and professional background appropriate to the project described herein and all project personnel, including professional experience above and beyond the minimum requirements.

**Advantageous** - The proposer has adequate qualifications, resources, and professional background appropriate to the project described herein and all project personnel, including professional experience above and beyond the minimum requirements.

**Not Advantageous** - The proposer has limited qualifications, resources, and professional background appropriate to the project described herein and all project personnel.

### **Quality of the Consultant's Experience**

The quality of the consultant's experience in providing the scope of services is most important to the City. Consultants with more relevant and recent experience on similar projects shall be given additional consideration.

**Highly Advantageous** - The proposed technical approach and plan of services demonstrates superior experience in providing services related to the City's requirements. The project synopses demonstrate a wide depth of experience with similar projects and prior experience with similar contracts. References indicate a strong ability to mobilize quickly and keep targeted completion milestones.

**Advantageous** - The proposed technical approach and scope of services demonstrates solid experience in providing services related to the City's requirements. The project synopses demonstrate a good depth of experience with similar projects, and prior experience with similar contracts. References indicate an ability to keep targeted completion milestones.

**Not Advantageous** - The proposer has not successfully had experience in providing services related to the City's requirements or with similar projects, or prior experience with similar contracts. References do not indicate an ability to keep targeted completion milestones.

#### **Experience with Municipal or Governmental Clients:**

Please provide examples of Executive Searches for Chief Equity Officers, Chief Diversity Officers, or similar executive level positions (EOs) with other municipal or governmental clients of more than 1,800 employees.

**Highly Advantageous** - The firm submitted more than ten (10) Executive Searches for EOs.

**Advantageous** - The firm submitted six (6) to ten (10) Executive Searches for EOs.

**Not Advantageous** - The firm submitted the minimum of five Executive Searches for EOs.

#### **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.

**Proposed plan of services** The response to this RFP shall include a written plan that addresses all phases and deliverables outlined in the scope of services noted above.

**Highly Advantageous**- The proposed plan is well-documented and developed with a clear timeline. The proposed plan and strategy set forth by the Consultant is highly defined, focused on the City's stated goals and objectives, understandable and clear. The plan exceeds the stated scope of services as outlined in this RFP.

**Advantageous** – The proposed plan is adequately defined with a stated timeline. The plan is capable of meeting the stated scope of services as outlined in this RFP but provides little additional enhancement to the stated scope of services.

**Not Advantageous** – The proposed plan is insufficient and lacks detail in several areas. The plan provides limited information as to how the proposer will meet the stated scope of services as outline in this RFP.

#### **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 or dialog from services performed for other similar municipalities.

**REQUEST FOR PROPOSALS / RFP #: 8009-W3~ PRICE PROPOSAL**  
**Executive Search Consultant – Chief Equity Officer – 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 the Executive Search Consultant for the Chief Equity Officer 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 \$130,000.00.

<b>Options for Costing:</b>	
Professional fee per recruitment (percentage of position salary at \$ 130,000.00) - <i>Option A</i>	%
<b>OR</b>	
Fixed fee per recruitment - <i>Option B</i>	\$
<b>Ancillary costs: (per search)</b>	
Advertising Expenses	\$
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