

# CITY OF BOSTON

## ENVIRONMENT DEPARTMENT



### FACILITATION, TECHNICAL AND DESIGN SUPPORT FOR: "BOSTON CLIMATE ACTION PLAN UPDATE"

October 1, 2018

REQUEST FOR PROPOSALS: EV00005893

**RESPONSE DEADLINE: October 26, 2018**

*Martin J. Walsh, Mayor*  
*Carl Spector, Commissioner, Environment Department*

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## I. INTRODUCTION

### 1.1 WHAT WE ARE LOOKING FOR

The City of Boston, acting through the Environment Department, is seeking a qualified consultant or team of consultants to provide facilitation, technical, and design services in support of the Boston Climate Action Plan (CAP) update. This update will serve as a blueprint for the next phase of the City's climate work.

#### ***Our challenge***

In 2017, Mayor Walsh committed Boston to becoming carbon neutral by 2050. Our last CAP update in 2014 had identified all the steps the City needed to take to reach our 80x50 climate goal and refined the City's climate preparedness framework. Now, we need to take all of our existing strategies and options, and craft a plan that gets us all the way to carbon neutrality in 2050. We also need to develop specific implementation roadmaps to advance high-priority projects in the next 3 years.

Since our last CAP update, we have made strides towards reducing our emissions and preparing for the impacts of climate change. In 2016, we released our plan to prepare for the impacts of climate change, known as *Climate Ready Boston*, and we are now developing neighborhood-level coastal resilience strategies and carrying out follow-up studies on extreme temperature, infrastructure, and more. We're also evaluating how we can transform Boston into a zero-waste city through the ongoing *Zero Waste Boston* planning initiative, in fulfillment of another commitment made in the 2014 CAP update.

The CAP isn't the only City plan that addresses climate change. Each of our citywide public planning efforts have strategies to reduce greenhouse gas emissions and prepare for the impacts of climate change, including *Imagine Boston 2030*, our citywide plan to leverage our economic growth to create a thriving city for all Bostonians by 2030, *Go Boston 2030*, our vision for a transportation system that is affordable, reliable and sustainable, *Resilient Boston*, our strategy to ensure that the benefits of Boston's growth and development are shared with all Bostonians, and our *Open Space & Recreation Plan*, our plan for an open space system that enriches and supports Boston's communities.

To reach our 2050 climate goals, we need to take all of our strategies and options, and forge a path to carbon neutrality. The *Carbon Free Boston* report that will be released this fall by the Boston Green Ribbon Commission and our academic partners will provide an extensive analysis of our building, transportation, energy and waste policy and technology options to reach this goal. We need to build off this analysis to identify our key next steps.



During this next CAP update, we want to:

- Adopt near-, medium- and long-term actions that will ensure we achieve carbon neutrality and are climate-ready by 2050.
- Develop implementation roadmaps for high-priority next steps to be implemented in the next 3 years.
- Fulfill the City of Boston's commitment to the Paris Climate Agreement by creating a [Paris-compliant CAP](#).

**This RFP is seeking a qualified consultant or team of consultants to provide support in facilitating the City's CAP stakeholder engagement strategy, building implementation roadmaps and developing a final report.**

It is open to any vendor who would like to respond, and the City encourages participation from small, local, minority-owned, women-owned, and veteran-owned businesses. To support equality of opportunity for these businesses, we also encourage respondents to solicit for the subcontracting of goods and services from certified businesses. The City's directory of certified businesses is available at [cityofboston.gov/slbe/search](http://cityofboston.gov/slbe/search).

The City strongly encourages the inclusion of local community groups to guide the public engagement process. To facilitate partnerships between interested potential vendors that bring complementary facilitation, technical, and design expertise to this project, vendors have the option to add their contact information to a publicly-available list through the following link: <https://tinyurl.com/y8h2gxdj>. The subsequent list can be seen at this link: <https://tinyurl.com/yc9qcde1>.

### ***Our values***

**Goal-oriented:** We have some tough choices ahead of us, but we recognize that we need to take strong, dynamic action now to reach our 2050 climate goal.

**Equity:** We want to ensure that the benefits and opportunities of climate action extend to all Bostonians as we work to create a healthy, resilient and thriving City for all.

**Transparency:** Transparent climate action planning and implementation gives our constituents a say in determining the outcomes of climate action. We work hard to make information about Boston's climate challenges and the actions we're taking accessible to all ages and backgrounds.

**Accountability:** We want to ensure the plan has clear milestones and metrics, and that we can provide regular progress updates.

**Effectiveness:** We want a plan that recognizes where we are, that aims high and that works.



**Data-informed:** We believe in using data to help us understand all of our policy and technology options and identify the steps we need to take now to reach our 2050 goals.

**Source of funding**

The Environment Department has **up to \$150,000** through the City of Boston’s operating budget to award under this procurement. It is expected that this project will be completed by **June 30, 2019**. Our goal is to make responsible use of taxpayer dollars and choose the partner that provides the best overall value, taking into account the strength of your technical proposal and your pricing.

1.2 RFP CONTACT

With the release of this RFP, all communications must be directed in writing via email to the contact person below. Any oral communication is considered unofficial and non-binding to the City.

After the proposal deadline, vendors should not contact the RFP contact or any other City official or employee, except to respond to a request by the RFP contact.

The RFP contact is:

Alison Brizius  
Environment Department  
City Hall Room 709  
1 City Hall Square  
Boston, MA 02201  
Phone: (617) 635-2931  
Email: [alison.brizius@boston.gov](mailto:alison.brizius@boston.gov)

The Website for this RFP and related documents is: [boston.gov/procurement](http://boston.gov/procurement).

All project correspondence will be posted on the RFP website, through the City’s Supplier Portal. It is the responsibility of vendors to check for updates and any RFP addenda.

1.3 TIMELINE

The table below shows the preliminary RFP Schedule. Dates are subject to change. Any changes will be posted in an addendum that can be found on the RFP website.



	DATE
RFP released	October 1, 2018
Optional Q&A Conference Call at 10am Dial: (515) 604-9322; Access code: 660691  Deadline to submit questions regarding the RFP via email to <a href="mailto:alison.brizius@boston.gov">alison.brizius@boston.gov</a> <b>by end of day</b>	October 9, 2018
Consolidated Q&A posted by the City in the Supplier Portal by end of day	October 11, 2018
<b>Deadline for proposals</b>  <i>Submitted via the City's Supplier Portal or via hard copy; must be <b>received prior to the 4pm deadline</b></i>	October 26, 2018
Consultant team interviews	Week of October 29
Contractor selected	By November 9, 2018
Project work period	November 12 - June 30, 2019

\*Please note that all proposals will be public record. **Do not submit confidential information in your Proposal.**



## II. SCOPE OF WORK

### 2.1 PROJECT ORGANIZATION

The City of Boston (acting through the Environment Department) will oversee the CAP update as part of a longer-term process to achieve carbon neutrality and prepare the City for the impacts of climate change, while helping the region continue to prosper and grow. This strategy is coordinated with Boston’s overall planning and development initiatives including its first master plan in 50 years, *Imagine Boston 2030*, and will fulfill Boston’s climate commitments as a leading member of C40 Cities Climate Leadership Group.

This project will be under the direction of a Steering Committee, led by the City of Boston Environment Department.

This project will also convene working groups to build out implementation roadmaps for the highest-priority climate actions. These implementation working groups may include representatives from:

- City and state agencies,
- Local businesses and property owners,
- Non-profit groups,
- Neighborhood associations and residents,
- Local institutions such as universities, hospitals and cultural institutions.

### 2.2 PROPOSED PROJECT TIMELINE

The table below shows the preliminary CAP update timeline. Dates are subject to change.



TENTATIVE PHASE COMPONENTS	
Fall 2018	<p><b>Onboarding</b></p> <ul style="list-style-type: none"> <li>• Synthesize progress towards climate-related actions across City plans</li> <li>• Refine outreach and engagement approach and plan</li> <li>• Attend <i>Carbon Free Boston</i> report release event</li> </ul>
Winter 2018	<p><b>Internal development</b></p> <ul style="list-style-type: none"> <li>• Work with the City to identify highest-priority climate actions that will be the focus of implementation working group’s efforts</li> <li>• Communicate high-priority next steps to the public and prepare for next engagement phase</li> <li>• Develop participatory budgeting program pilot design</li> </ul>
Spring 2019	<p><b>Stakeholder engagement</b></p> <ul style="list-style-type: none"> <li>• Launch implementation working groups and additional small focus group meetings as needed to develop roadmaps for prioritized actions</li> <li>• Solicit participatory budgeting projects from the general public that align with CAP priorities</li> </ul>
Summer 2019	<p><b>Final report &amp; deliverables</b></p> <ul style="list-style-type: none"> <li>• Compile assessments, draft and finalize implementation roadmaps and report</li> <li>• Submit final deliverables and plan public release</li> <li>• Guide participatory budgeting voting and selection, provide recommendations for next program steps</li> </ul>

### 2.3 PROJECT GOALS

This process will result in an updated CAP that details a prioritized set of climate actions with specific implementation roadmaps that guide the City’s climate action over the next 3 years. A clear roadmap is critical for the City to be successful as we take our next steps to be climate-ready and carbon-neutral by 2050. This update will also seek to empower residents to carry out community-level action in support of Boston’s climate goals.

**This RFP is for the selection of a stakeholder engagement and technical team to facilitate stakeholder engagement to develop implementation roadmaps for the City’s highest-priority next steps for climate action, and empower the wider community to act**





**on climate. The consultant team will leverage the stakeholder engagement process to craft a CAP update that integrates climate mitigation and adaptation and puts the City on the path to carbon neutrality and climate preparedness.**

The scope of work for the consultant team shall consist of the following tasks, which the City may modify in collaboration with our selected partner. All activities will be undertaken in close coordination with the City of Boston and the Steering Committee.

## **TASK 1: STAKEHOLDER ENGAGEMENT AND FACILITATION**

### *1A: Facilitation of implementation working groups*

The CAP update is focused on taking action. As a result, implementation roadmaps to complete or make meaningful progress towards the City's highest-priority climate actions (identified in Task 2B) within the next 3 years, until the next CAP update, are a key final deliverable. The goal here is to carry out focused engagement that convenes key stakeholders to build out those roadmaps. We anticipate facilitation will represent the bulk of the consultant's work in this project.

**The consultant team will propose a stakeholder engagement process geared towards generating action-specific implementation roadmaps.** Please be creative and fully detail your approach to facilitation and your proposal for working group structuring and participant selection process. Proponents are strongly encouraged to review the engagement models provided by *Imagine Boston 2030*, *Go Boston 2030*, *Climate Ready Boston*, *Zero Waste Boston* and prior CAP updates, but may also propose other approaches.

**Deliverables:** Design and execution of stakeholder engagement process; synthesis of stakeholder feedback and translation into implementation roadmaps.

### *Task 1B: Participatory climate budgeting pilot*

As well as focusing on implementation by the City and its partners, we want the CAP process to create opportunities for residents to take action within their community networks. Part of our ongoing efforts to engage the community on CAP goals is our "train the trainers" program, [Greenovate Boston Leaders](#), now entering its third cohort. Please view this program as a tool or mechanism that could support your own approach to the CAP's stakeholder engagement process.

In this task, **the consultant team will develop a participatory climate budgeting program pilot.** The goal of this program is to create a citizen-centered approach to climate action that empowers Bostonians to carry out projects that contribute directly to the implementation of our highest-priority climate actions, with the City's support. The



consultant team will strive to implement a successful pilot program and provide recommendations as to whether and how to translate the pilot into a lasting program.

Funding for implementation of the participatory budgeting project(s) is not expected to be included in this RFP budget.

**Deliverables:** Pilot design and testing; recommendations for future participatory budgeting program.

## **TASK 2: TECHNICAL ASSISTANCE**

### *2A: Research summary and synthesis*

**The consultant team will review recent City planning and policy documents pertaining to climate mitigation and adaptation and other relevant publicly available data and maps, and conduct key stakeholder interviews.** This will serve to build a foundational understanding of local planning and climate challenges and opportunities, and inform action prioritization and implementation roadmap development. Key documents and ongoing initiatives that should be reviewed include:

- 2007 *Climate Action Plan* and 2011 and 2014 updates,
- *Carbon Free Boston* (released expected in Fall 2018),
- *Climate Ready Boston*, neighborhood coastal resilience strategies, follow-up studies,
- *Zero Waste Boston*.

Other important references include but are not restricted to: *Imagine Boston 2030*, *Go Boston 2030*, *Boston Housing 2030*, *Resilient Boston*, *BuildBPS*, *Open Space and Recreation Plan 2015-2021*, *Boston Community Energy Study* and *Boston Planning and Development Agency Smart Utilities Policy*.

Consultant work on this task is expected to begin as soon as the selection process is completed.

**Deliverables:** Synthesis of climate-relevant actions and summary of progress towards those actions; updated project and stakeholder engagement plan.

### *2B: Prioritization of climate mitigation actions*

The 2014 CAP Update identified the actions Boston needed to take to reach its 80x50 goal. The upcoming *Carbon Free Boston* report will allow the City to understand how far existing strategies and additional policy and technology options can take us towards carbon neutrality. It will assess the potential emissions reduction impact of different policies and technologies, as well as potential costs and co-benefits.



Using the results of the upcoming analysis, existing City plans, and community feedback from recent City planning initiatives, **the consultant team will assist the City as we identify evaluation criteria and prioritize climate near-term actions** that are key to getting us on the path to carbon neutrality.

These high-priority actions will be the focus of the implementation working groups gathered in Task 1A.

**Deliverables:** Initial prioritization of climate mitigation actions into near-, medium- and long-term using a replicable methodology; presentation to Steering Committee.

#### *2C: Development of implementation roadmaps*

At the end of the CAP update process, the City expects to dispose of action-specific roadmaps that will guide implementation a of our highest-priority climate actions. **These roadmaps should constitute a user-friendly and feasible blueprint for implementation of key near-term climate actions and meaningful progress toward mid- and long-term measures, including metrics for success.** The consultant team should propose a process to create the implementation roadmaps that leverages feedback from stakeholder engagement, and that builds on the assessment of existing City plans and initiatives undertaken in Task 2A. In their proposal, consultants may include examples of models or templates as sources of inspiration, explaining how they best position the City to advance our climate goals.

**Deliverables:** Implementation roadmap template; draft and final individual implementation roadmaps for highest-priority actions embedded in the final CAP Update report, including key metrics for tracking progress and success.

### **TASK 3: COMMUNICATION, GRAPHIC DESIGN AND FINAL REPORT**

**The consultant team will be responsible for developing a compelling visual language to clearly explain and showcase Boston’s CAP update in a way that is accessible and web- and mobile-friendly.** Please detail how you approach creating engagement materials, and designing and communicating around final deliverables.

All materials created for the initiative, including those for the Steering Committee, must follow the City of Boston’s brand guidelines (available at [boston.gov/brand](http://boston.gov/brand)). The consultant team acknowledges that all produced materials and rights thereof shall belong to the City.

**Deliverables:** Digital materials and presentations for engagement activities; draft and final publicly accessible and web- and mobile- friendly report, including implementation roadmaps; communications and release plan.



### III. TECHNICAL PROPOSAL FORMAT

The “technical proposal” is every element of your response to this RFP, except for anything having to do with price (the price proposal covers that section).

For the technical proposal, we are looking for you to: (3.1) provide an introduction; (3.2) describe your approach for this project; (3.3) share your background and qualifications; (3.4) describe your team; (3.5) provide three references; and (3.6) sign our standard contract forms. **We encourage you to be concise and strongly recommend a 50-page limit to the Technical Proposal.**

#### 3.1 INTRODUCTION AND EXECUTIVE SUMMARY

On the cover or first page of your proposal, please provide contact information, including name, title, address, email and phone number. Please provide a brief introduction highlighting why you would be a good partner for the City on this project.

#### 3.2 RESPONSE TO SCOPE OF WORK

Please describe your understanding of the scope of work, and how your team proposes to meet our needs. This section is a critical component of the proposal and **should include a detailed description of your proposed work plan, project schedule, and team organization**. As part of your response, please provide specific answers to the following questions:

- **What are the key ingredients of a climate action plan?** How does your approach and timeline help to deliver a CAP update that will help the City and its partners to make meaningful progress towards its climate goals? Provide examples of climate action plans that inspire you and inform your thinking. Please clearly distinguish between examples of your past projects, and inspiration and best practices you draw from elsewhere.
- **How would you approach developing implementation strategies and tracking progress?** What kinds of information would you seek to include in an implementation roadmap? How should stakeholders be expected to contribute? How would you track progress towards implementation of highest-priority actions?
- **What is your approach to the stakeholder engagement process?** Please lay out your approach on a project timeline, including the specific stakeholder groups in the project area that should be engaged in this process. Who on your team will take the lead on the engagement component, and what unique skills, diversity, and local expertise do they bring? How will you approach engagement during the CAP update process to its implementation? Please describe:



- Your experiences facilitating productive conversations and effective dialogue between diverse stakeholders with different interests.
- Your experiences with multiple methods of collecting and synthesizing ideas and comments from the public.
- Your experiences hosting and/or collaborating on public meetings and events in partnership with diverse communities.
- Your team’s definition of and approach to ensuring an equitable and accessible engagement process.
- Your existing relationships and collaborations with community partners and what their role may be in helping lead community engagement efforts.
- Your understanding of the socially vulnerable communities in Boston and plan to conduct outreach and frame climate and sustainability topics so that they are relevant to the community, particularly socially vulnerable audiences, new audiences or audiences traditionally not engaged with sustainability.
- Your proposal for structuring the implementation working groups.

Please also provide samples of materials intended for a lay audience, such as:

- Flyers, brochures, web content
  - Presentations
  - Sample graphics/data visualizations and renderings for lay audiences
  - Sample layout for a community open house-style event
- **Clearly lay out the interim and final deliverables your team will provide for this project**, given the scope, budget, and timeline. Explain what will be included in the deliverables, and how you will ensure these deliverables best position the City to advance project recommendations towards implementation. You should only include budget/pricing information in your price proposal; it is important not to mention price in your technical proposal.

### 3.3 VENDOR BACKGROUND AND COMPANY QUALIFICATIONS

Describe your organization’s history, structure, strategy, and work. Focus on your ability to be the right partner on this project and how subcontractors improve your team’s ability to meet our goals.

**Please note:** If you have had a contract terminated for default during the past five (5) years, or have been involved in litigation regarding a contract, this fact should be disclosed along with your position on the matter(s). If you have experienced no such terminations for default in the past five (5) years and have not been involved in contract litigation, then you should indicate as such.



### 3.4 STAFFING AND KEY STAFF QUALIFICATIONS

Describe the team that would work on this project. Include a list of key team members and an organizational chart. Make the case for why they will be great partners on this project and explain their familiarity and experience with Boston neighborhoods, stakeholders, and local climate action planning. Note if the project manager and staff will be located in Boston and their hourly availability to the City staff on this project and to meet in-person at City Hall.

Please provide bios, resumes or whatever you think best highlights the strength of the team that would be working on this project. Let us know how the team would be structured; if your team includes multiple firms, please let us know how long and in what capacity you have worked together. For legal purposes, we will need you to designate one firm as the prime contractor and all others as subcontractors (see Section 7 for more information).

### 3.5 REFERENCES AND ADDITIONAL INFORMATION

Please provide three (3) references, including their contact information and details on your history with them. Client references should be preferably similar in size, scope and complexity to the City of Boston. Note that incorrect contact information will be considered as a negative reference.

### 3.6 STANDARD CONTRACT AND FORMS

You must submit a signed copy of all forms identified in Section 8.



## IV. PRICING PROPOSAL

In a separate price proposal, include a statement of availability and hourly rates that will be charged for key personnel, including all fringe benefits and overhead. Upon selection, the consultant will enter into a contract with the Environment Department for the total cost stated.

Each price proposal must include a minimum contingency fee of five thousand and 00/100 (\$5,000.00). The Consultant team may increase this fee on the fee form provided they provide an explanation for this variance. The total fee proposed must take into account this required minimum contingency fee.

Understanding the level of effort and cost for each deliverable will help us better understand the structure of the proposed work. Please note:

- All prices are inclusive of travel. No additional charges, including travel lodging, subsistence, miscellaneous (ad-hoc) expenses and other expenses, will be allowed.
- The City is exempt from federal excise taxes (Federal Exemption No. A-108-328) and from Massachusetts sales and use taxes (Certificate No. E-046-001-380). Exemption certificates will be provided, if requested, following award.
- The total cost that is quoted in this Proposal will be considered a best and final offer.
- You will bear the onus of any errors made in pricing the services (e.g., omitting a component of the services).
- The Price Proposal MUST be submitted separately from the remainder of the proposal. No price information may be included in the Technical Proposal.

More detailed instructions are available in Section 5 and at

<https://www.boston.gov/departments/procurement/how-use-supplier-portal>.



## V. SUBMISSION INSTRUCTIONS

This section provides an overview of the process for submitting your proposal.

Vendors are strongly advised to read this section in its entirety and complete the checklist to avoid disqualification. **Please note that the City will NOT be able to consider proposals that are submitted late or that do not follow these guidelines.**

5.1 CHECKLIST FOR SUBMITTING PROPOSAL <i>(for your use only; you do not need to submit this checklist)</i>		COMPLETE (✓)	
<b>A. REQUIRED ITEMS FOR TECHNICAL PROPOSAL</b>			
Introduction and Executive Summary			
Response to Scope of Services			
Vendor Background & Company Qualification			
Staffing Plan and Key Staff Qualifications			
References and Additional Information			
<b>B. REQUIRED FORMS, if awarded contract:</b>			
Form CM06 – Certificate of Authority			
Form CM-09 – Contractor Certification			
Form CM15A – CORI Compliance			
Form CM15B – CORI Standards			
Form LW2 – Living Wage Agreement			
Form LW8 – Living Wage Affidavit			
Form CM-16 – Wage Theft			
<b>C. PRICE PROPOSAL COST FORM</b>			
<b>FINAL REVIEW</b>		YES	NO
1. Did you submit the proposal before the deadline?			
2. Did you submit separate, sealed technical and price proposals, with <b>no</b> price information in the technical proposal?			
4. Did you review the Contract Terms and Conditions?			
5. Did you complete and submit all required forms?			





## 5.2 SUBMITTING PROPOSAL VIA BOSTON'S SUPPLIER PORTAL

The Supplier Portal provides vendors the ability to submit a proposal electronically, and is accessible from [boston.gov/procurement](https://www.boston.gov/procurement) at the Supplier Portal link.

You'll need to register with us in order to submit your proposal electronically; doing so will also allow you to receive email updates regarding this RFP and other opportunities. Please visit <https://www.boston.gov/departments/procurement/how-use-supplier-portal> for step-by-step instructions to register.

Upon logging in under your account, look for event ID **EV00005893**. When responding, you will see specific places to upload your non-price Technical Proposal and other required forms. The Price Proposal must be submitted separately from the Technical Proposal according to statute. This is critically important. The evaluation team will complete its evaluation of the Technical Proposals prior to reviewing the Price Proposals.

Attachments containing price information, including the Price Proposal, should only be attached to the price line and not in the Event Header attachments section. By uploading your file to the price line, the information will remain sealed and separated from the technical proposals until that evaluation has been performed.

In the section of **EV00005893** labeled "Step 2: Enter Line Bid Responses", please enter the total bid amount. Next, click the icon on the far right of the screen labeled "View/Add Question Comments and Attachments." There you will find the proper location to upload your Price Proposal. For step-by-step instructions, please visit <https://www.boston.gov/departments/procurement/how-use-supplier-portal>.

Submitting your proposal via the Supplier Portal can streamline the entire process, but please allow extra time to become familiar with the system. **Upload any applicable documents into the Supplier Portal and SUBMIT your submissions well before the deadline so that you have enough time to make a physical paper submission if you have any issues with the City's Supplier Portal.** We recommend submitting your proposal at least 24 hours prior to the deadline. Please contact [vendor.questions@boston.gov](mailto:vendor.questions@boston.gov) or 617-961-1058 for help with the Supplier Portal.

## 5.3 SUBMITTING VIA MAIL/ DELIVERY

Hard copies of the Technical and Price Proposals may be submitted by mail, delivery service, or in person. Vendors submitting a hard copy must submit five (5) hard copy versions of a complete Technical Proposal in a sealed envelope along with one (1) digital copy (thumb drive), and a Price Proposal in a separate sealed envelope along with one (1) digital copy (thumb drive).



The envelopes should be clearly marked as follows:

“Support for Boston Climate Action Plan Update”

RFP Number: RFP **EV00005893**

TECHNICAL PROPOSAL

Submitted by: [Name of Vendor]

[Date Submitted]

“Support for Boston Climate Action Plan Update”

RFP Number: RFP **EV00005893**

PRICE PROPOSAL

Submitted by: [Name of Vendor]

[Date Submitted]

and delivered or mailed to:

Naida Faria

Environment Department

City Hall Room 709

1 City Hall Square

Boston, MA 02201

**Proposals must be received by 4:00PM on October 26, 2018.**



## VI. HOW WE CHOOSE

### 6.1 MINIMUM EVALUATION CRITERIA

All Proposals received by the City will first be reviewed to determine whether the Proposal meets all minimum criteria identified in the RFP. Minimum criteria are found in the Checklist for Submitting Proposal (Section 5.1).

For a proposal to meet all minimum criteria, a Vendor must unconditionally be able to check each item as 'Completed' for Sections A and B and 'Yes' for each item in Section C. Minimum evaluation criteria reflect those standards or attributes that the City considers essential to the performance of the contract. A Vendor that does not meet the minimum criteria will be rated "not responsive".

### 6.2 COMPARATIVE EVALUATION CRITERIA

Proposals that have met all minimum evaluation criteria will be evaluated according to the comparative evaluation criteria that follow in this section. After reviewing, the evaluation team will prepare written evaluations for each proposal. The evaluators will assign a rating of "highly advantageous", "advantageous", or "not advantageous" to each criterion. The team will use the comparative evaluation criteria to assist in their evaluation of each Vendor's overall qualifications.

The City may choose to conduct reference checks and include information obtained from the interview and reference checks in the evaluation. Interviews will be mandatory for any consultants wishing to be considered for the contract award.

NOTE: Vendors should not count on interviews and reference checks as an opportunity to provide additional information not contained in the proposal. All information that Vendors wish the selection team to consider during the evaluation process should be included in the originally submitted Proposal.

Price proposals will be evaluated separately from the technical proposals. The evaluation team will not see the price proposals until after the technical evaluations are complete.

The City will then identify the proposal that's the most advantageous overall from the pool of responsible and responsive vendors, taking into consideration both price and the comparative evaluation criteria.



All proposals will be evaluated and judged on a comparative basis by the Environment Department pursuant to General Laws c. 30B, s. 6. Proposals will be evaluated on the following criteria:

- Qualifications and Experience
- Response to Scope of Services
- Consultant Team
- Allocation of Resources

### **Qualifications and Experience**

*Highly advantageous:* The respondent has, and documents in their proposal: a) substantial experience in facilitating group dialogues and proven success in coordinating multi-stakeholder, collaborative public policy processes, working directly with people from diverse racial, ethnic, and socioeconomic background, and developing quality materials responsive to different audiences' needs; b) demonstrated ability to effectively convene, facilitate, and manage multi-stakeholder meetings; c) experience in organizing community events and conferences addressing complex public policy issues, and the ability to conduct outreach and frame climate and sustainability topics so that they are relevant to the community, particularly new audiences or audiences traditionally not engaged with sustainability; d) comprehensive understanding of climate impacts, policies, challenges and opportunities, particularly for Boston residents and other key stakeholders; e) subject matter expertise in urban sustainability, including the building, transportation, waste and transportation sectors and social equity dimensions; f) expertise in graphic design and communications to produce a user-friendly report and to display initiative findings in an accessible and dynamic way.

*Advantageous:* The respondent has, and documents in their proposal, some: a) experience in facilitating group dialogues and multi-stakeholder public policy processes; b) experience coordinating internal and external meetings and large events; c) experience in communicating on complex policy issues, specifically related to climate change and sustainability in urban contexts, to diverse audiences; d) understanding of climate and urban sustainability issues; e) experience working directly on urban sustainability and climate-related projects; and f) expertise in graphic design and communications to produce a final report that is accessible to diverse audiences.

*Not advantageous:* The respondent has limited or no, or does not document in their proposal: a) experience in communicating effectively with diverse stakeholders and facilitating group dialogues; b) experience in event coordination; c) experience in communication on technically and politically complex issues; d) knowledge of Boston's



climate challenges and opportunities; e) subject matter expertise in urban sustainability and climate change; f) expertise in graphic design and communications.

**Response to Scope of Services**

*Highly advantageous:* The respondent has: a) shown an extensive and thorough understanding of the Scope of Services as demonstrated by the respondent’s creative and detailed approach to this RFP; b) presented a well-conceived, detailed and organized work plan and schedule; c) demonstrated a thoughtful, creative and equitable approach to stakeholder engagement, including specific groups in the project area to engage and how they should be involved in this process; d) proposed an effective strategy to translate working group feedback into implementation roadmaps; e) proposed a well-conceived and organized approach to coordination with multiple stakeholder groups, the Steering Committee, and relevant ongoing planning processes in Boston.

*Advantageous:* The respondent has: a) shown an understanding of the Scope of Services as demonstrated by the respondent’s creative approach to this RFP; b) presented an organized work plan and schedule; c) proposed a strategy to integrate equity considerations into the stakeholder engagement and facilitation task; d) explained how they plan to approach implementation working group meetings to facilitate the creation of the implementation roadmaps; e) proposed an organized approach to coordination with multiple stakeholder groups, the Steering Committee, and relevant ongoing planning processes in Boston.

*Not advantageous:* The respondent has: a) not shown an understanding of the Scope of Services as demonstrated by the respondent’s approach to this RFP; b) not presented an organized work plan; c) not proposed a method to address equity in the CAP update process and final output; d) not proposed an approach to use implementation working groups to generate the climate action roadmaps; e) not proposed an organized approach to coordination with multiple stakeholder groups, the Steering Committee, and relevant ongoing planning processes in Boston.

**Consultant Team**

*Highly advantageous:* The respondent has a) assigned a highly qualified, local project manager and other key personnel to this project with strong familiarity and experience with Boston community and neighborhood dynamics, facilitation of group dialogue, and consensus-building with diverse stakeholders, as well as with Boston planning history and context, land use, urban design, and climate action planning; b) experience conducting outreach to neighborhood and local stakeholders, and c) demonstrates strong working relationships with relevant community partners and proposes ways to integrate additional strategic community partners into their outreach efforts.



*Advantageous:* The respondent has a) assigned a qualified project manager and other key personnel to this project; b) previous experience conducting outreach to Boston neighborhoods or key business or institutional stakeholders; c) identified strategic community partners and proposed how to integrate them into their engagement approach and outreach efforts.

*Not advantageous:* The respondent a) has not assigned project team members with relevant projects and planning initiatives, and b) has no experience conducting outreach to Boston neighborhoods and local stakeholders or working with key community partners.

**Allocation of Resources**

*Highly advantageous:* The proposal: a) allocates significant attention to priority work items; b) allocates resources in balanced manner between different engagement formats and different groups targeted for engagement, and c) contains a highly realistic and detailed work schedule to complete the tasks described in the scope of services.

*Advantageous:* The proposal: a) allocates sufficient attention to priority work items; b) specifies resource allocation between engagement formats and audiences, and other tasks; c) contains an adequate work schedule to complete the tasks described in the scope of services.

*Not advantageous:* The proposal: a) allocates insufficient attention to priority work items; b) allocates an insufficient portion of the project timeline to stakeholder engagement, and c) does not contain an adequate work schedule to complete the tasks described in the scope of services.

The Environment Department reserves the right to waive portions of the RFP for all applicants, or to reject all proposals, if deemed in the best interest of the City and the Environment Department. The Environment Department is under no obligation to fund any proposal.



## VII. TERMS AND CONDITIONS

### 7.1 CANCELLATION, REJECTION, AND WAIVER

The City is under no obligation to proceed with this RFP and may cancel the RFP at any time with or without the substitution of another. The City reserves the right to reject in whole or in part any or all Proposals, when the City determines that rejection serves the best interests of the City. The City may waive minor informalities in the Proposal or allow the Vendor to correct them.

### 7.2 WITHDRAWAL OR MODIFICATION OF PROPOSAL

The City may allow a Vendor representative bearing proper authorization and identification to sign for, receive and withdraw the Vendor's unopened Proposal prior to the submission deadline. A Vendor that seeks to correct or modify its Proposal may do so by withdrawing the initial submission and then submitting a modified Proposal prior to the submission deadline.

### 7.3 PROPOSAL VALIDITY PERIOD

By submitting a Proposal the Vendor agrees that its Proposal is valid for one hundred eighty (180) days following the submission deadline unless extended by mutual agreement.

### 7.4 PROPOSAL COSTS

Any and all costs incurred by a Vendor in preparing a Proposal and throughout the RFP process are ineligible for reimbursement by the City.

### 7.5 TAXES

The City is a tax-exempt organization. However, should any part of the Contract be subject to taxes, unless otherwise specified in this RFP, the Vendor shall be responsible for paying all taxes that are applicable.

### 7.6 SUBCONTRACTORS

The City will contract with one Contractor who will be solely responsible for contractual performance and who shall be the sole point of contact for the City with regard to Contract matters. In the event the Contractor utilizes one or more Subcontractors, the Contractor will assume all responsibility for performance of services by the Subcontractor(s). The Environment Department reserves the right to select a Lead Consultant.

The City must be named as a third party beneficiary in all subcontracts. A list of all Subcontractors proposed to take part in the performance of the Contract shall be



provided to the City for approval prior to Contract execution.

#### 7.7 USE OF CITY NAME

The Contractor and any Subcontractor(s) agree not to use the City of Boston name or seal, or that of any other City Agency or Department in advertising, trade literature, or press releases without the prior approval of the City.

#### 7.8 INTELLECTUAL PROPERTY

The consultant team must acknowledge that any documents, materials, graphics or otherwise created by the consultant team, and any rights in said documents, materials, graphics or otherwise, shall belong to the City. The consultant team shall indemnify and hold harmless the City of Boston, its successors, assigns, and licensees, and their respective officers, directors, agents, and employees, from and against any and all claims, damages, liabilities, costs, and expenses, including reasonable attorneys' fees, arising out of or in any way connected with any claim that the documents, materials, or graphics created by the consultant team infringe any intellectual property rights or other rights of any third party. If awarded the contract pursuant to this Request for Proposals, this indemnification and hold harmless agreement shall be part of the contract and survive the term and the completion of the services performed under the contract.

#### 7.9 AWARD AND CONTRACT

If a Contract is awarded, the Contract will be awarded to that responsive and responsible Vendor whose Proposal is deemed most advantageous to the City taking into consideration the evaluation criteria and Proposal Pricing. The City will contract with the selected Vendor that best meets the City's needs.

An award letter or award notification is not a communication of acceptance of a Vendor's proposal. No final award has been made until final execution of a Contract by the Vendor and the City of Boston (by its Awarding Authority/Official and the City Auditor), and the approval of the final Contract by the Mayor of Boston, as well as Contractor receipt of a City issued Purchase Order. Until such time, the City may reject any or all proposals or elect not to proceed with this RFP. The Vendor shall not furnish any services, equipment, materials or labor unless a fully executed and approved Contract and Purchase Order is received from the City, and funds are appropriated for the Contract.

#### 7.10 CONTRACT

In addition to the City of Boston's Standard Contract, Forms CM-10 and CM-11, and any applicable supplemental terms and conditions that are part of this RFP, the Contract will include, without limitation, City required forms and certifications, including the City's CORI Compliance Certification, Living Wage form, Wage Theft Form, Contractor





Certification, and Certificate of Authority. These forms are attached hereto and/or are available upon request. The submitted Proposal, along with the RFP, will also be part of the Contract between the City and the Contractor.

The Contract is subject to the availability and appropriation of funds and may be cancelled by the City without penalty in any year in which an appropriation is not made.

#### 7.11 PUBLIC RECORDS

After the submission period, proposals will become public record.

#### 7.12 INSURANCE REQUIREMENTS

The Contractor shall purchase and maintain during the term of the Contract all insurance required by the Commonwealth of Massachusetts and as required in this section, and will assure that subcontractors carry similar and appropriate coverage. These requirements shall not be construed to limit the liability of the Contractor or its insure.

Insurance will be issued by insurance companies licensed to write insurance in their domicile state and the Commonwealth of Massachusetts, and will have a current Best's rating of A- VII or above. Insurance Certificates on Acord Form 25 evidencing all requirements listed below, will be delivered to the Official prior to work being performed, with renewal certificates delivered within 30 days prior to expiration of the preceding policy. Failure to provide and continue to enforce such insurance will be deemed a material breach of contract. Insurance Requirements:

**Workers' Compensation** insurance as required from under General Laws c.152 (the Workers' Compensation Law) and including employer's liability limits of one million (\$1,000,000) per accident and per employee, including disease.

**Commercial General Liability** with coverage no less than ISO CGL Form, CG00 01 0413, for one million (\$1,000,000) per occurrence and two million (\$2,000,000) annual aggregate limit per location or project basis.

**Automobile Liability** (Any Auto/Hired/Non-owned) for one million (\$1,000,000) combined single limit per accident.

**Professional Liability/Errors and Omissions** for one million (\$1,000,000) per claim and one million (\$1,000,000) in the aggregate with coverage continuing for one year after work period.

#### **General Conditions:**

- City of Boston will be named as Additional Insured on all policies except Professional, Workers' Compensation and Employer's Liability.
- Above insurance shall be primary and noncontributory over any such insurance



- available to the City of Boston, its officials, employees and volunteers.
- Waiver of Subrogation will be included as respects all coverages listed above in favor of City of Boston. The Workers' Compensation Policy must be specifically endorsed and noted as such in the required certificate.
  - All policies will be endorsed to provide thirty days written notice to the certificate holder, the City of Boston, in the event of cancellation, non-renewal or material changes in coverage. Such endorsements must be attached to the Certificate.

## VIII. STANDARD CONTRACT AND FORMS

### 8.1 OVERVIEW

If awarded, you must submit a signed copy of the forms indicated below. Additionally, please review the Terms and Conditions in the CM11; they will be incorporated at contract award without revision.

### 8.2 FORM CM06 – CERTIFICATE OF AUTHORITY: SIGNED COPY REQUIRED

### 8.3 FORM CM09 – CONTRACTOR CERTIFICATION: SIGNED COPY REQUIRED

### 8.4 FORM CM10 – STANDARD CONTRACT DOCUMENT

### 8.5 FORM CM11 – STANDARD CONTRACT GENERAL CONDITIONS

### 8.6 CM FORMS 15A/B – CORI COMPLIANCE, STANDARDS: SIGNED COPY REQUIRED

### 8.7 CM FORM 15C – CORI WAIVER

### 8.8 FORM LW1 – REQUIREMENTS OF THE BOSTON JOBS AND LIVING WAGE ORDINANCE

### 8.9 FORM LW2 – LIVING WAGE AGREEMENT: SIGNED COPY REQUIRED

### 8.10 FORM LW8 – VENDORS LIVING WAGE AFFIDAVIT: SIGNED COPY REQUIRED

### 8.11 FORM CM16 – WAGE THEFT: SIGNED COPY REQUIRED

