

# CITY OF BOSTON

## REQUEST FOR PROPOSALS:

### FY 2025 Black Male Advancement Equity Study for City of Boston (Phase I)



City of Boston  
Black Male  
Advancement

**FRANK FARROW**  
**BAIS EVENT EV00014652**

#### IMPORTANT DATES:

EVENT	DATE
RFP Issue Date	<b>August 12, 2024</b>
Proposal Due Date	<b>October 4, 2024 4PM EST</b>

See the full RFP schedule in Section 2.1

#### CONTACT INFORMATION:

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All questions should be emailed with the **RFP number (BAIS EVENT EV00014652)** in the subject line.

You can access this RFP and related documents on the City of Boston Supplier Portal, via [boston.gov/procurement](https://boston.gov/procurement).

# PROJECT SUMMARY:

The City of Boston (“The City”), acting through the Mayor’s Office of Black Male Advancement (“The Office”), requests proposals from a qualified research team, consultant, or team of consultants and researchers to provide technical and administrative support for the development of an equity study<sup>1</sup> or studies with a focus on Black men and boys for the City of Boston. This RFP addresses Phase I only. In Phase I, the selected team will conduct an assessment to identify data sources and gaps relevant to the overall study. Based on these findings, the consultant will advise the Office on how to proceed to Phase II, designing an equity study to study the social and economic conditions of the City of Boston’s Black Men and Boys.

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<sup>1</sup> For more information: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation. “Conducting Intensive Equity Assessments of Existing Programs, Policies, and Processes,” by Kate Bradley, Kimberly Aguillard, Amanda Benton, Laura Erickson, Sofi Martinez, and Brittany McGill. Washington, District of Columbia: 2022.

# WHAT IS A REQUEST FOR PROPOSALS (RFP) AND HOW DOES IT WORK?

**What:** An RFP is a document that explains what services the City of Boston needs and is looking to purchase from vendors (you!).

**Why:** The RFP explains what a vendor needs to do to compete for this opportunity, how they will be evaluated, and how the contract will be managed.

## How:

- Read through the RFP carefully and decide if you want to compete for the contract.
- Register as a vendor on the Supplier Portal (if you aren't already); you can access the Supplier Portal via [boston.gov/procurement](https://boston.gov/procurement), and get assistance by emailing [Vendor.Questions@boston.gov](mailto:Vendor.Questions@boston.gov) or joining their office hours
- Put together your technical proposal and price proposal and **be sure to keep them separate. Failure to do so will disqualify your proposal.**
- If you have questions, email questions to [frank.farrow@boston.gov](mailto:frank.farrow@boston.gov) by **August 23, 2024 5PM EST.**
- Submit your final technical and price proposals separately, as well as any other necessary forms. Do not include any price information in your technical proposal or presentation or the City will reject your entire proposal. Read the instructions carefully on how to submit each of these proposals. Be sure to leave plenty of time for submission.

## RFP Structure:



**Read** sections I and II



**Respond** to sections III and IV



**Follow the directions** in section V

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## I. INTRODUCTION AND PURCHASE DESCRIPTION



*Read sections I and II*

### **IMPORTANT INFORMATION:**

- **By submitting a proposal, each proposer accepts the RFP specifications, Boston’s RFP terms, and Boston’s standard contract terms and conditions (found in the Appendix below).**
- **Once awarded, the contract will be governed by the terms and conditions listed in forms [CM-10 and CM-11, which shall be incorporated by reference into this RFP](#). Please see **Appendix 2** for a full list of the forms that the selected vendor will be required to sign and submit during the contracting process if awarded this contract. Please **review** these before submitting your proposal. Failure to agree to the City of Boston’s standard contract terms and conditions will result in your Proposal being deemed non-responsive to the solicitation and therefore rejected.**

### **1.1 BACKGROUND**

A 2021 ordinance established the Black Men and Boys Commission (“The Commission”) in the City of Boston. Made up of 21 Black males with experience, knowledge and expertise on issues pertaining to Black men and boys in the City of Boston, the Commission serves as an advisory board for the Mayor and Mayor’s Office of Black Male Advancement, including determining budget and policy priorities.

Among the Commission’s duties is studying the social and economic conditions of the City’s Black men and boys, developing strategies to remedy or assist in remedying serious adversities, and making recommendations to create equal opportunity for education, employment, access to public accommodations, and fair

housing, significantly improving the life trajectory, physical, mental, economic and emotional wellness of generations of Black men and boys in the City of Boston.

Based on community listening sessions, monthly Commission meetings, FY 2024 policy recommendations, working sessions with various city agencies, and meetings with Mayor Michelle Wu, the Commission recommended for FY 2025 certain budget proposals to further the mission of the Commission and the Office of Black Male Advancement.

To fulfill the Commission’s FY 25 budget recommendation for an “equity study to assess, quantify, and evaluate the prevalence, significance (degree and weight) and scope of inequities by the City of Boston, if any, against Black men and boys,” the Office of Black Male Advancement, seeks proposals for a qualified research team, consultant, or team of consultants and researchers to assist with the first phase of the work by conducting a comprehensive assessment of data associated with City of Boston policies, programs and services. The data assessment and resulting report will be used to inform the next phase, and will include final recommendations to the Office on how to conduct the equity study.

## 1.2 SCOPE OF SERVICES

***This section is very important.*** It outlines what we are asking for and gives an in-depth look at what we are expecting.

*In Massachusetts Procurement Law, this is part of the “Purchase Description.”*

### 1.2.1 Overview

The City intends to produce a report that will detail, quantify, and evaluate the prevalence, significance (degree and weight) and scope of inequities by the City of Boston, if any, against Black men and boys. The purpose of the report is to identify key data to understand how the City’s service delivery performs for Black men and boys and uncover what works well and unwell so that the City can understand the

social and economic conditions of Black men and boys in Boston. The requested services shall be completed across two project phases. This RFP will cover Phase I of the equity study. The next phase will be done with another RFP at the conclusion of Phase I. The selected supplier for the Phase I RFP will not assist the City directly with the drafting of the future RFP for Phase II.

This Scope of Services is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project. Offerors may include additional scope details as part of their project plan.

All written deliverables are subject to City approval.

### 1.2.2 Activities

The team will identify data sources and gaps relevant to the overall study and assist the City in analyzing the implications of Phase I for Phase II. The tasks involved in conducting that assessment will include but not be limited to the following activities:

#### **A. Black Men and Boys Support Ecosystem and Engagement**

- a. Stakeholder Interviews
  - i. Black Men and Boys Commission
  - ii. City of Boston Departments
  - iii. Employers
  - iv. Business Associations
  - v. Employment Organizations
  - vi. Educational Resources
  - vii. Skill Building Organizations
  - viii. Community Groups
  - ix. Violence Prevention and Justice-Involved Resources
  - x. Government Agencies
  - xi. Housing and Homeownership Organizations

- xii. Public Health Resources
- b. Neighborhood Canvassing
  - i. Engaging Black men and boys directly through canvassing efforts in Roxbury, Dorchester, Mattapan, Hyde Park, and other Boston neighborhoods
- c. Working Groups/Focus Groups
- d. Community Listening Sessions

## **B. Data Collection**

- a. Spending and use of funding
  - i. Amount of dollars spent on select programs and resources and their service populations disaggregated by race and gender
- b. Data Gaps
  - i. Identifying unavailable or incomplete data
  - ii. Timeliness and relevance of data in post-COVID era
  - iii. Granularity and quality of data (disaggregated, consistent, accurate, etc.)
  - iv. Data entry practices

## **C. Data Analysis**

- a. Perform a detailed analysis of the collected data to identify key trends, disparities, and areas of concern
- b. Locate dollar amounts that are going to programs and resources to benefit black men and boys through the City of Boston Department budgets, external funds, and their service populations disaggregated by race and gender.
- c. Locate dollar amounts going to benefit Black men and boys through procurement, grants, and their service populations disaggregated by race and gender
- d. Use statistical and mixed methods to provide a comprehensive overview of social and economic status, health outcomes, educational attainment, employment patterns, and other relevant factors.

## **D. Comparative Research**



- a. Black men and boys national trends
- b. Peer city Black men and boys trends
- c. Community-held datasets that already exist, including any university studies or research that centers Black men and boys

### 1.2.3 Final Deliverables

1. The selected team shall produce an **original work of analysis in written form** and deliver their final report to the Office of Black Male Advancement at the end of contract term. The team shall provide a draft of the report to the Office 45 days prior to the deadline of the final report. The Office will review and comment on the draft report within 25 days of the final report submission, and the team shall incorporate any comments and address any questions as soon as possible upon receipt of the Office's comments.
2. The team shall give a **public presentation at a Black Men and Boys Commission** meeting on their progress and major insights from their work at some point during their work plan, prior to the release of the final report.

The final results of this research and data shall be made publicly available on the BMA webpage. The final report will also include specific desired deliverables in the report or in the form of appendices in the following areas:

#### **Black Men and Boys Support Ecosystem and Engagement**

- Final Deliverables Desired:
  - A spreadsheet listing the number of stakeholder interviews requested and conducted, the number of focus group participants, and community listening session attendance counts.
  - Stakeholder interview, focus group, and community listening session interview guides/protocols, notes, recordings, and transcripts
  - Stakeholder interview, focus group, and community listening session analysis, summaries, and thematic trends.

## **Data Collection**

- Final Deliverables Desired:
  - A spreadsheet database of resource flows and funding going to programs specifically disaggregated by race and gender.
  - Written documentation of any and all missing quantitative data, including what was not collected and why.

## **Data Analysis**

- Final Deliverables Desired:
  - A map and/or visualization of the disparities, key trends, areas of concern with breakdowns by neighborhood, race, and gender.
  - Tables outlining dollar amounts going to programs and resources to benefit black men and boys through the City of Boston Department budgets, external funds, and their service populations disaggregated by race and gender and dollar amounts going to benefit Black men and boys through procurement, grants, and their service populations disaggregated by race and gender.

## **Comparative Research**

- Final Deliverables Desired:
  - Articles, program booklets, and commentary on Black men and boys from across the nation.
  - An excel database with each city in the U.S. that has an office or commission specifically dedicated to supporting Black men and boys, their contact information, and their mission.

## RFP PROCESS

### 1.3 PROPOSAL TIMELINE

The table below shows the preliminary RFP schedule. Dates are subject to change. For the most updated information, please visit the Supplier Portal via [boston.gov/procurement](http://boston.gov/procurement).

EVENT	DATE
RFP Released	August 12, 2024
Questions Due to the City <i>Via email to <a href="mailto:frank.farrow@boston.gov">frank.farrow@boston.gov</a></i>	August 23, 2024 5PM EST
Consolidated Q&A Posted by the City <sup>2</sup>	August 30, 2024
<b>Deadline for Proposals</b> <i>See Submission Instructions for details</i>	October 4, 2024 4PM EST
Vendor interviews <i>(if needed; see details in Section 2.3)</i>	Rolling
Contractor Selected	October or November 2024

*\*All times are in Eastern Time\**

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<sup>2</sup> The consolidated Q&A posting will include answers to all RFP questions posed to the City at the Q&A Conference Call and by the email by the due date above. The City will update the Q&A if it chooses to answer any additional questions after that time.

## 1.4 WHAT TO DO IF YOU HAVE QUESTIONS

Before the proposal deadline, all communications must be **emailed to frank.farrow@boston.gov** with the **RFP number (BAIS EVENT EV00014652)** in the subject line.<sup>3,4</sup>

## 1.5 CONTRACT TERM AND OTHER INFORMATION

The City will award **one contract** for Phase I.

The term of the contract will be **nine months**, with an option to extend for an additional three (3) months at the City's sole discretion. The nine (9) month period of performance is anticipated to be from **October 2024 through July 2025**.

The expected budget for the project is **\$80,000**.

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<sup>3</sup> No other City employee, consultant, or contractor is empowered to speak for the City with respect to this RFP. Any oral communication is considered unofficial and non-binding to the City.

<sup>4</sup> **After the proposal deadline, Vendors should not contact the RFP Coordinator or any other City official or employee about this RFP**, except to respond to a request by the RFP Coordinator. Vendors may continue to contact City officials and employees about issues **unrelated** to this RFP.

## II. HOW WE CHOOSE



*This section explains how we will evaluate candidates. It provides clear descriptions for what we consider a highly advantageous proposal.*

We will evaluate your proposal based on two sets of criteria: **minimum evaluation criteria** and **comparative evaluation criteria**.

### 2.1 MINIMUM EVALUATION CRITERIA

First, we will review all proposals to see if they meet the minimum (or “quality”) evaluation criteria listed below. These are “yes-or-no” standards that will apply to every proposal.

These criteria reflect the standards that the City considers **essential** for this contract, as well as statutory thresholds for responsive and responsible proposers.

Any vendor that does not meet these minimum criteria is “not responsive” and will be eliminated from further consideration.

The minimum evaluation criteria include:

1. Did the vendor submit the proposal by the **deadline, appropriately and truthfully**?
2. Did the vendor submit **separate technical and price proposals** (with no price information in the technical proposal)? *Note: Any technical proposal or interview/demonstration that includes price information will be disqualified from consideration. (See below for further information and instructions about separately submitting your technical and price proposals).*
3. Did the vendor submit and complete all the necessary **forms and documentation requested in this RFP**?

## 2.2 COMPARATIVE EVALUATION CRITERIA

Proposals that have met all minimum evaluation criteria will move to the next stage of evaluation. In this stage, we will evaluate proposals according to the comparative evaluation criteria described below.

### CRITERIA 1: PROPOSAL QUALITY

- *Highly Advantageous:* The proposal is well-written in clear, concise language. Materials are organized and easy to navigate. As a whole, the proposal provides a complete response to this RFP and provides multiple relevant examples of past successes implementing similar solutions.
- *Advantageous:* The proposal is clear and well-organized. It provides a complete response to this RFP and includes examples of past successes.
- *Not Advantageous:* The proposal does not address all aspects of the RFP. It is poorly written and/or difficult to read. It does not provide adequate information to evaluate the vendor's ability to successfully meet the City's goals.
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### CRITERIA 2: WORK PLAN

- *Highly Advantageous:* The proposal clearly lays out a plan to complete the work. It provides a clear and thorough response to each of the pieces of the scope of services. The proposals (as parts and as a whole) demonstrate a firm grasp of the assessment phase, and demonstrate a comprehensive understanding of the source material relevant to the research process. It also provides a thorough timeline for conducting research and completing a report, in partnership with the Office, on Black men and boys in the City of Boston. The proposal explicitly details a comprehensive plan for community-engaged research for Phase I. The proposal demonstrates a clear vision for the extent of work that writing the report would require, and provides original insight on how the assessment phase should take shape. The proposal seems fully thought out and ready to execute/write.

- *Advantageous*: The proposal is of acceptable quality. It addresses the majority of the major concerns, but leaves a few open questions. The proposal displays a grasp of the topic area of Black men and boys, describes the nature of the inquiry that the organization would undertake, and demonstrates an understanding of source material relevant to the research process. The proposal makes mention of community-engaged research methods, but the plan is incomplete/the proposal does not have demonstrated experience in the space. The proposal could be workable to solve the problem, but would require some further clarification.
- *Not Advantageous*: The proposal does not address all aspects of the RFP. It is poorly written and/or difficult to read. It does not provide adequate information to evaluate the vendor's ability to successfully meet the City's goals.

### **CRITERIA 3: COMPANY/ORGANIZATION PROFILE AND PAST PROJECTS**

- *Highly Advantageous*: The proposal demonstrates deep experience with researching, designing, and conducting equity assessments and studies. Offeror has completed three or more comparable projects involving the preparatory analysis for or design of an equity study. The Offeror has more than 5 years relevant previous experience successfully designing and conducting equity studies.
- *Advantageous*: The proposal demonstrates moderate experience with researching, designing, and conducting equity studies. Offeror has completed two or fewer comparable projects involving the preparatory analysis for or design of an equity study. The Offeror has less than 5 years relevant previous experience successfully designing and conducting equity studies.
- *Not Advantageous*: The proposal demonstrates minimal experience with researching, designing, and conducting equity studies. Offeror has completed one or fewer comparable projects involving the preparatory analysis for or design of an equity study. The Offeror has less than 3 years relevant previous experience successfully designing and conducting equity studies.

#### CRITERIA 4: MUNICIPAL EXPERIENCE

- *Highly Advantageous*: The proposal demonstrates deep knowledge of working within a municipal regulatory and legal environment. The Offeror can provide three or more examples of project work that requires developing an in-depth understanding of regulatory and legal constraints in a municipal context. Project work demonstrates the ability to think creatively and come up with innovative solutions within a legally constrained context.
- *Advantageous*: The proposal demonstrates moderate experience working within a municipal regulatory and legal environment. The Offeror can provide two or more examples of project work that required developing an in-depth understanding of regulatory and legal constraints in a municipal context.
- *Not Advantageous*: The proposal demonstrates minimal experience working within a municipal regulatory and legal environment. The Offeror can provide one or fewer examples of project work that requires developing an in-depth understanding of regulatory and legal constraints in a municipal context.

#### CRITERIA 5: COMMUNITY-ENGAGED METHODS

- *Highly Advantageous*: Applicant demonstrates a commitment to community via both the methodological practices of their research and the composition of their team. The applying individual, team, or organization also demonstrates a clear commitment to diversity and equity through the composition of the research team assembled for the project.
- *Advantageous*: Applicant demonstrates some commitment to community via both the methodological practices of their research and the composition of their team. The applying individual, team, or organization also demonstrates some commitment to diversity and equity through the composition of the research team assembled for the project.
- *Not Advantageous*: Applicant demonstrates either no commitment to community via both the methodological practices of their research or the



composition of their team, OR demonstrates little commitment, intentionality, or expertise across both categories.

#### **CRITERIA 6: TIMING**

- *Highly Advantageous:* The Proposal provides a detailed and realistic timeline that projects project completion of Phase I within 9 months. The timeline includes checkpoints and a methodology for adjusting the process to account for contingencies while maintaining the projected timeline. A compelling justification is provided if a longer timeline is provided.
- *Advantageous:* The Proposal provides a detailed timeline that projects completion of Phase I in 9 months. If the project completion is projected outside of this timeframe, a compelling explanation is provided.
- *Not Advantageous:* The Proposal fails to provide a detailed timeline.

#### **CRITERIA 7: STAFFING**

- *Highly Advantageous:* The proposal identifies the position titles / roles of most of the individuals proposed for the project, including the project manager that will be assigned to this project. The Project Manager identified has at least five (5) years' of relevant experience for this project. Staff is available for on-site consultation, as requested by the City, on short-term notice.
- *Advantageous:* The proposal identifies the position titles / roles of most of the individuals proposed for the project, including the project manager that will be assigned to this project. The Project Manager identified has at least five (5) years' of relevant experience for this project. Staff is available for on-site consultation, as requested by the City, with reasonable notice.
- *Not Advantageous:* The proposal identifies the position titles / roles that will be involved in the project but does not identify the specific individuals or identifies individuals with experience that does not meet the needs of this project.

### 2.3 INTERVIEWS (IF NEEDED)

An additional component of this evaluation process may include a(n) interview . We anticipate these taking 30-60 minutes and occurring during the month of September. We will use the evaluation criteria listed below to evaluate the interview. NOTE: Pricing information may only be included in your sealed price proposal. Do not include any pricing information or your entire proposal will be rejected.

#### CRITERIA 8: INTERVIEW (IF NEEDED)

- *Highly Advantageous*: Presenters are well-organized and provide a clear, concise presentation. The presentation demonstrates strong insight into the City's requirements, as described in the RFP. Technical staff are included in the demonstration, and all questions posed by the evaluation team were specifically addressed.
- *Advantageous*: Presenters are organized. Presentation demonstrates understanding of the City's requirements, as described in the RFP.
- *Not Advantageous*: Presenters are not organized and/or provide an unclear presentation. Presentation demonstrates little understanding of the City's requirements, as described in the RFP.

### 2.4 RULE FOR AWARD AND CONTRACT

The City will select the responsible and responsive proposer (who has met all submission requirements and minimum evaluation criteria) who has submitted the most advantageous proposal, based on both the proposed price and the comparative evaluation criteria.

**Please Note:** An award letter or award notification is not a communication of final acceptance of a Vendor's proposal. No final award has been made until the following three steps have occurred:

1. Final **execution of a Contract by the Vendor and the City of Boston** (by its

- Awarding Authority/Official and the City Auditor);
2. The approval of the final Contract by the Mayor of Boston; and
  3. Contractor receipt of a City issued Purchase Order.

The forms in Appendix 1 of this RFP are incorporated into the Contract by reference.

**\*\*\*The City reserves the right to cancel this RFP at any time until proposals are opened, and further reserves its right to reject all proposals after they are opened if the City determines doing so is in its best interest.**

### III. YOUR TECHNICAL PROPOSAL



Your application will be submitted in two parts. The first part (this section) is the **Technical (Non-Price) Proposal**. The Technical Proposal will be evaluated to determine whether it meets all of the submission and quality requirements specified in the RFP.

**Do NOT mention pricing in this section. If you include pricing information in your technical proposal your proposal will be rejected in its entirety.**

**Why can't you include price in the technical proposal?** The law requires that we look at the technical and pricing proposals separately. This allows us to first determine who would be the best at implementing the project, without considering price. Next, we consider price proposals. Once both technical and price proposals are evaluated, we choose the most advantageous proposal that provides the best value overall.

Your technical proposal should consist of the following sections (each detailed in the following pages). Your **technical proposal** should be submitted as one document that addresses all components listed below.

An editable version of the template below is included in the “package” on this RFP’s Supplier Portal page. You should complete the editable template and submit it as your technical proposal.

- (3.1) Cover Page
- (3.2) Response to Scope of Services
- (3.3) Ownership Details (Informational only)
- (3.4) References
- (3.5) Insurance Documentation (and financial documents if needed)
- (3.6) Standard Contract Forms

### 3.1 COVER PAGE

Please include a cover page as the first page of your technical proposal.

COVER PAGE		
RFP Title and Number		
Primary Organization Name		
Company Founding Year		
Type of Organization		
Contact Information	Name	
	Title	
	Address	
	Email	
	Phone	
A brief introduction highlighting why you would be a good partner for the City on this project (4-5 sentences).		

### 3.2 RESPONSE TO SCOPE OF SERVICES

This section is where you tell us how your solution meets or exceeds our needs by answering the questions/prompts below. Feel free to use anything (e.g. graphics, links to your work, etc.) that helps you make your case. Suggested response lengths are for guidance only. Feel free to answer with more or less detail as needed to best answer the question, and feel free to use anything (e.g., graphics, links to your work, etc.) that helps you make your case.

**Q1: Please explain why your organization is best-suited to manage this RFP?**

An ideal answer will include the following information, focusing on why these qualities of your organization make it best-suited to manage this RFP:

- What services your organization provides and how long your organization has been providing these services
- Your organization’s structure and strategy
- Any relevant awards your team has received

Response:

More specifically, please include:

- Your organization’s experience in conducting and completing **large-scale research projects**, highlighting any significant work or projects pertinent to Black or African American history; people of African descent in Boston; and research related to any of the aforementioned subjects.

Response:

- Your organization’s experience of **involvement and engagement directly with community-based primary sources** (informal archives, oral histories, engagement with community organizations, community elders, etc.).

Response:

- Any prior work or demonstrated relationships pertinent to **local public history in the City of Boston**, and especially local Black history in the City of Boston.

Response:

**Q2: Who will work on this project and why are they best qualified to achieve the goals of this RFP?**

An ideal answer will include:

- A description of the team that would work on the project (either currently known or roles you would seek to build out on the team)
- A description of the team structure
- A list of key team members, along with a:
  - ◆ A clearly identified team leader
  - ◆ Brief summary of relevant credentials and experience for each team member
  - ◆ Note if any staff will be located in or near the City of Boston
  - ◆ Resumes / CVs
- Justification for why they will be great partners on this project

Response:

**Q3: If your team includes multiple organizations, please let us know (a) how long you have worked together and (b) which one organization will be designated as the prime contractor (all others will be designated as subcontractors). Skip if not applicable to your organization.**

	Name	How long you have worked together
Prime contractor		
Subcontractor		
Subcontractor		
Subcontractor		

**Q4: Describe the process for performing the scope of services, including a detailed description of your work plan and project organization.**

An ideal answer will include:

- Key activities, deadlines, and deliverables required to complete the scope of services, organized in a logical, easy-to-follow manner
- Consideration as to the unique activities that may be required to complete the work of each area of focus included in the response
- Core activities required to understand the regulatory landscape and assess legal options available as it relates to the equity study

If needed, please attached additional documents.

Response:
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**Q5: What other organizations or individuals immediately would you engage to ensure that Phase I can be started with minimal additional City of Boston direction?**



Response:

**Q6: Have you been debarred or otherwise prohibited by a government entity from responding to its competitive solicitations within the last five (5) years?**

- Yes
- No

**Q7: Describe the circumstances surrounding such debarment or other prohibition, including the name of the agency and date of action.**

Response:

**Q8: Have you had a contract terminated for default during the past five (5) years, or have been involved in litigation regarding a contract?<sup>5</sup>**

- Yes
- No

**Q9: If you answered “Yes” to the previous question, what is your position on the matter(s)?**

Response:

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<sup>5</sup> **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 must 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 must indicate as such. The City reserves the right to request a copy of your firm’s audited financial statements, including a detailed balance sheet and profit and loss statement for three years, or Dun & Bradstreet reports or similar financial reports, in order to evaluate the financial strength of your company.

### 3.3 OWNERSHIP DETAILS (INFORMATIONAL ONLY)

**Q1. Is your organization a small, local, minority-owned, women-owned, and/or veteran-owned business?<sup>6</sup> (Yes or No)**

- Small
- Local
- Minority-Owned
- Women-Owned
- Veteran Owned

**Q2: Is your organization certified as a small, local, minority-owned, women-owned, and/or veteran-owned business with the City of Boston? If you are unsure, you can check here:**

<https://www.boston.gov/certified-business-directory>

- Yes
- No

If you are not certified but would like to be, you can find directions for how to apply here: <https://www.boston.gov/certified-business-application>

Becoming a certified small, local, minority-owned, women-owned, and/or veteran-owned business with the City of Boston provides you with many opportunities:

- Exclusive access to Sheltered Market Program contracts (listed toward the bottom of [this page](#))
- Targeted outreach for released procurements
- Support building your business and navigating the procurement process

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<sup>6</sup> These details are used to help us improve our outreach to all potential partners, and are for informational purposes only; this RFP is open to any vendor who would like to respond.

- Access to the new Inclusive Written Quote Contract procurements, which provide a simpler way for businesses to get into government contracting.

**Q3. Are any of your proposed subcontractors a small, local, minority-owned, women-owned, and/or veteran-owned business?<sup>7</sup>**

- Yes
- No
- No subcontractors / Not applicable

### 3.4 REFERENCES

Please provide three (3) references, including their contact information and details on your history with them, who can comment on the firm’s performance on prior research projects during the last five years. Customer references should be preferably similar in size, scope and complexity to the City of Boston.

REFERENCES		
<b>REFERENCE EXAMPLE</b>	<b>Organization</b>	Smith Events
	<b>Project Manager (or equivalent)</b>	Jennifer Smith
	<b>Phone number</b>	845-111-2222
	<b>Email (if available)</b>	jsmith@smithevents.com
	<b>Project Description</b>	Planned and implemented a family-friendly concert on the steps of City Hall. Worked with diverse community organizations to select performers and vendors. Hosted 150 residents.
	<b>Project Start and End Dates</b>	March 2020 - May 2020
<b>REFERENCE 1</b>	<b>Organization</b>	

<sup>7</sup> Same as above.

	Project Manager (or equivalent)	
	Phone number	
	Email (if available)	
	Project Description	
	Project Start and End Dates	
REFERENCE 2	Organization	
	Project Manager (or equivalent)	
	Phone number	
	Email (if available)	
	Project Description	
	Project Start and End Dates	
REFERENCE 3	Organization	
	Project Manager (or equivalent)	
	Phone number	
	Email (if available)	
	Project Description	

**3.5 INSURANCE DOCUMENTATION**



**Attach documentation of your insurance coverage.** The City’s recommended levels of insurance are listed in **Appendix 2**.

**If you have a different level of coverage, you must explain below why that is sufficient to manage the risk of this project.**

Response:

### **3.6 STANDARD CONTRACT TERMS**



Attach a completed [CM-16 Wage Theft Prevention Certification](#).

## IV. YOUR PRICE PROPOSAL



The **Pricing Proposal** is where you will share your estimated project budget with us and where you will explain your costs/budget.

IMPORTANT: The Price Proposal (and all pricing information) MUST be submitted separately from the remainder of the proposal. No price information may be included in the Technical Proposal or your Interview. **If you do not separate all pricing information from your Technical Proposal, your entire proposal will be rejected.**

The pricing proposal (which lists all costs associated with your proposed deliverable) is required in addition to the technical proposal. There are two steps:

1. **Please complete the price proposal template** provided below.
2. **Please enter the total price for 9-month contract in the price line if submitted electronically through the Supplier Portal.** More detailed instructions are available in the following section, Section VI, *Submission Instructions*. Instructions can also be found on the [Procurement Information Page](#).

### **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.
- Prices should **include any relevant research costs**, including expenses related to equipment for primary source work, and otherwise.
- The **total price** will be used to compare price proposals.
- In the price proposal, the City asks that you provide detailed pricing for all deliverables in the scope of services with the understanding that the deliverables and quantities of goods and services the City notes in this RFP are estimates only and that the final scope of services may change during contract negotiations between the City and the selected vendor(s).

- **No additional charges** will be allowed unless they are included in your Price Proposal.
- The vendor will bear the onus of any **errors** made in pricing the services (e.g., omitting a component of the services).
- Any taxes due will be assumed to be included in your price of services. 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 the award.

**4.1 PRICE PROPOSAL (REQUIRED)**

	HOURLY RATE	ESTIMATED QUANTITY*	TOTAL PRICE
[INSERT POSITION TITLES]		X hours	
[INSERT POSITION TITLES]		X hours	
[INSERT POSITION TITLES]		X hours	
[INSERT POSITION TITLES]		X hours	
<b>Total Fixed Price</b>			

*\*These additional hours are estimates only; the City may request more, less, or no additional services. Payment will be based on the unit prices provided here and the actual amount of services requested.*

**4.2 SUPPLEMENTAL INFORMATION (OPTIONAL)**

You have the option (but are not required) to attach additional information describing any costs that don't fit into the above template, to describe the

reasoning behind your pricing, or to state any assumptions you made while filling out the template.



## V. SUBMISSION INSTRUCTIONS



*This section shows you how to submit your application.*

- To be considered for funding, each applicant must submit a **complete proposal prior to October 4, 2024 4PM EST.**
  - See the checklist below (section 5.1) for the requirements for a complete application.
- Modifications are not permitted to any proposal once they are submitted.
- Complete applications can be submitted in two ways:
  - Through the [City of Boston Supplier Portal](#) (see section 5.2)
  - By mail or physical delivery (see section 5.3)
- Applicants often run into technical issues with the [City of Boston Supplier Portal](#). We STRONGLY recommend submitting your proposal in advance of the deadline to allow for enough time to navigate any technical issues you may have.
- The contact you listed in your submitted proposal will receive periodic email updates to let you know:
  - If your application has been received
  - If your proposal has been awarded or denied the contract
  - If we need any follow up information

**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

This checklist is for your use only; you do not need to submit this checklist along with your proposal.

CHECKLIST ITEM	COMPLETE (✓)
<b>IMPORTANT:</b> Submit <u>separate</u> technical and price proposals. (Do NOT include <u>any</u> price information in your technical proposal, otherwise your proposal will be rejected.)	
<b>A. TECHNICAL PROPOSAL</b>	
Included a <b>cover page</b> with all required information	
Responded to <b>questions and prompts</b> in “Response to Scope of Services”	
Responded to <b>questions</b> in “Ownership Details”	
Provided <b>3 references</b>	
Included required <b>documentation of insurance</b>	
<b>Complete and submit</b> the <a href="#">CM-16 Wage Theft Prevention Certification</a>	
<b>B. PRICE PROPOSAL</b>	
Provided <b>detailed budget and pricing</b>	
Provided <b>additional information about pricing proposal</b> (optional)	
<b>C. REVIEW CONTRACT TERMS &amp; CONDITIONS</b>	
Read and reviewed contract terms, conditions, and additional forms <b>If awarded the contract</b> , you will be required to sign and submit these forms	

## 5.2 SUBMITTING PROPOSAL VIA BOSTON'S SUPPLIER PORTAL

Vendors can submit a proposal electronically through the Supplier Portal. You can access the Supplier Portal from [boston.gov/procurement](https://www.boston.gov/procurement) at the Supplier Portal link. We do not accept proposals submitted via email or other electronic communication.

To submit using the Supplier Portal, follow the steps on this website [boston.gov/sites/default/files/embed/e/entering\\_a\\_bid\\_on-line\\_1.pdf](https://www.boston.gov/sites/default/files/embed/e/entering_a_bid_on-line_1.pdf). Below is a summary of those steps:

1. **REGISTER** (If you are not yet registered as a “bidder” on the Supplier Portal)
  - a. <https://www.boston.gov/departments/procurement/how-use-supplier-portal> provides step-by-step instructions to register.
2. **FIND EVENT:**
  - a. Log in to your account.
  - b. Click Main Menu > Manage Events and Place Bids > View Events and Place Bids.
  - c. Enter BAIS EVENT EV00014652 into the search box and click “Search” button.
  - d. Click FY 2025 Black Male Advancement Equity Study for City of Boston (Phase I)
  - e. Click “View Event Package.” Here you can download forms and documentation linked to this RFP. We recommend starting with “RFP\_BMA Equity Study Phase 1.”
  - f. Click the ‘OK’ button to return to the ‘Event Details’ page.
3. **ATTACH YOUR TECHNICAL AND PRICE PROPOSALS:**
  - a. Click on the ‘Bid On Event’ button.
  - b. Answer all questions and upload the required forms as directed, including the non-price technical proposal. **Do NOT include any price information in your technical proposal, otherwise your proposal will be rejected.** Click “Step 2: Enter Line Bid Responses”. Here is where you input your price information separately. If there are multiple lines, you

may need to enter separate amounts for each line item you are bidding on,

- c. Click the icon on the far right of the screen labeled “View/Add Question Comments and Attachments.” Here is where you will attach your Price Proposal (in the template provided above in Section 4.1)

**4. SUBMIT YOUR PROPOSAL:**

- a. Once you have responded to all required fields, you may click “Validate Entries” to confirm if your application is ready to be submitted.
- b. To submit your proposals, click “Submit Bid.”

Further instructions on registering and submitting a bid can also be found on the [Procurement Information Page](#). **We recommend submitting your proposal at least 24 hours prior to the deadline.**<sup>8</sup>

NOTE: MODIFICATIONS MAY NOT BE MADE TO YOUR PROPOSAL ONCE SUBMITTED TO THE PORTAL. PLEASE ENSURE YOUR PROPOSAL IS COMPLETE AND ACCURATE PRIOR TO YOUR SUBMISSION.

**5.3 SUBMITTING VIA MAIL / PHYSICAL DELIVERY**

You may submit hard copies of the Technical and Price Proposals by mail, delivery service, or in person. **If you choose to submit a hard copy, you must submit two separate envelopes: a complete Technical Proposal in one sealed envelope and a Price Proposal in a second sealed envelope.**

The envelopes should be clearly marked as follows:

<b>ENVELOPE #1 - TECHNICAL PROPOSAL</b> <b>**technical proposal should have absolutely no reference to price**</b>	<b>ENVELOPE #2 - PRICE PROPOSAL</b>
FY 2025 Black Male Advancement Equity Study for City of Boston (Phase I)	FY 2025 Black Male Advancement Equity Study for City of Boston (Phase I)

<sup>8</sup> Please note that Supplier Portal file uploads are limited to a 59-character file name length.

RFP Number: BAIS EVENT EV00014652 TECHNICAL PROPOSAL Submitted by: [Name of Vendor] [Date Submitted]	RFP Number: BAIS EVENT EV00014652 PRICE PROPOSAL Submitted by: [Name of Vendor] [Date Submitted]
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The envelopes should be delivered or mailed to:

<b>MAILING/DELIVERY ADDRESS</b>
Frank Farrow Department of Black Male Advancement Room 806 1 City Hall Square Boston, MA 02201

## **V. APPENDICES**

### **APPENDIX 1: RFP TERMS AND CONDITIONS**

#### 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.

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.

#### 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.

#### 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.

#### PROPOSAL COSTS

Any and all costs incurred by a Vendor in preparing a Proposal and throughout the RFP process are ineligible for reimbursement, or recovery from, the City and are solely the burden of the Vendor.

## TAXES

The City is a tax-exempt organization. However, should any part of the Contract be subject to taxes, the Vendor shall include and be responsible for paying all taxes that are applicable.

Any taxes due will be assumed to be included in your price of services, otherwise the Vendor is responsible for any additional costs not included. 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.

## 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 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.

## 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 written approval of the City.

## PUBLIC RECORDS

Proposals shall be confidential until the the time for acceptance specified in the RFP has expired. Thereafter, proposals will be public record and subject to disclosure upon request. Do not submit confidential information in your Proposal.

## **APPENDIX 2: CONTRACT TERMS AND CONDITIONS**

**Please be familiar with these terms and conditions at the time of proposal submission to ensure that you are able to meet them if awarded the contract.**

All applicants are required to **review** the following documents at this stage; some terms are verified electronically via the Supplier Portal, and **only the CM-16 Wage Theft form must be submitted with your proposal, per the instructions in Section 5 of this RFP.**

By submitting a proposal, an applicant acknowledges that if they are selected as the winning respondent, they will be required to complete and provide each of the below forms to the City as part of the contract package. The vendor will be disqualified if it does not submit completed versions of the following forms during the contracting process.

1. [Form CM-06](#) – Certificate of Authority (Only Required for Corporations)
2. [Form CM-09](#) – Contractor Certification
3. [Form CM-10 and CM11](#) – Standard Contract Document & General Conditions
4. CM Forms [15A](#), [15B](#) – CORI Compliance & Standard
5. [Form CM-16](#) – Wage Theft: **Complete and submit with your proposal**
6. [Form Wage-1](#) – Requirements Of The Boston Jobs, Living Wage, And Prevailing Wage Ordinance
7. [Form Wage-2](#) – The Boston Jobs, Living Wage, And Prevailing Wage Ordinance Vendor Agreement



### **APPENDIX 3: INSURANCE REQUIREMENTS**

As noted in Section III, *Your Technical Proposal*, the City requires the following levels of insurance.

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 insurer.

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 shall be delivered to the Official by the selected vendor prior to the execution of any contract. Additionally, renewal certificates must be delivered within 30 days prior to the expiration of the preceding policy.

#### **Insurance Requirements:**

1. **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.
2. **Commercial General Liability** with coverage no less than one million (\$1,000,000) per occurrence and two million (\$2,000,000) annual aggregate limit per location or project basis.
3. **Automobile Liability** (Any Auto/Hired/Non-owned) for one million (\$1,000,000) combined single limit per accident.
4. **Umbrella Liability excess of Commercial General Liability, Employer's Liability and Auto Liability** for one million (\$1,000,000) each occurrence. In

lieu of umbrella liability, required limits may be achieved by purchasing higher limits on individual policies.

5. **Technology Errors & Omissions / Cyber Liability / Security & Privacy:** for one million (\$1,000,000) per claim and one million (\$1,000,000) in the aggregate with coverage continuing for one year after completion or termination of the Agreement. Policy must specifically include: a) computer or network systems attacks, b) denial or loss of service, c) introduction, implantation or spread of malicious software code, d) unauthorized Access and Use of computer systems, e) privacy liability, and f) breach response coverage equaling at least 50% of liability limit.
6. **Third Party Crime / Employee Dishonesty:** for \$1 million per claim and \$1 million in the aggregate. Coverage is required if vendor will have access to personal or municipal financial information and/or records maintained by City
7. **Professional Services** for two million (\$2,000,000) per claim and two million (\$2,000,000) in the aggregate with coverage continuing for one year after work period.

#### **General Conditions:**

- City of Boston must be named as Additional Insured on all policies except, 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 the 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.