



# CITY OF BOSTON

## WRITTEN QUOTE CONTRACT:

# Boston Cannabis Equity Program Business Support Technical Assistance



Economic Opportunity & Inclusion  
Segun Idowu  
EV00015191

### PROJECT SUMMARY:

The Office of Economic Opportunity & Inclusion (OEI) is soliciting competitive quotes from vendors who can provide tailored general business advice and project support to cannabis equity businesses. The selected vendor must be able to provide comprehensive general business support ensuring safe, efficient, and compliant operations.

### WQC SCHEDULE:

EVENT	DATE
WQC Issue Date	Tuesday, November 12, 2024 at 12:00 PM
Virtual Q&A Session	Monday, November 25, 2024 4:30 - 5:30 PM (subject to change) Zoom Link <a href="https://bit.ly/WQC2024QA">https://bit.ly/WQC2024QA</a>
Quote Due Date	Friday, December 13, 2024 at 12:00 PM

## CONTACT INFORMATION:

Shekia Scott | [Shekia.Scott@boston.gov](mailto:Shekia.Scott@boston.gov)

All questions should be emailed with **EV00015191** in the subject line.

You can access this WQC **and submit your quote electronically** through the City of Boston Supplier Portal, via [boston.gov/procurement](http://boston.gov/procurement).

## I. INTRODUCTION AND SCOPE OF WORK



*This section provides introductory information about the project and highlights important elements like the problem, goals, **scope of work**, project timeline, and contact information.*

### IMPORTANT INFORMATION:

- **By submitting a quote, each respondent accepts the terms and conditions listed in forms [CM-10](#) and [CM-11](#) which are incorporated herein by reference.** Please see **Appendix 1** for a full list of the forms that the selected vendor will be required to sign and submit during the contracting process if awarded.

With this Written Quote Contract (WQC), we are hoping to solicit competitive quotes from vendors who can provide general business consulting tailored to the needs of pre-certified and certified equity cannabis businesses. The selected vendor should be able to work along with the business to provide a comprehensive suite of services, including crafting business plans, application assistance, conducting market research, advising on regulatory compliance, optimizing operations, managing finances, developing marketing strategies, overseeing human resources, managing risks, and facilitating strategic partnerships, all aimed at ensuring compliance, driving efficiency, and fostering sustainable growth in the industry.

### Background

In November 2019, Mayor Martin J. Walsh, in partnership with Councilor Kim Janey and the Boston City Council, signed [An Ordinance Establishing Equitable Regulation of the Cannabis Industry in the City of Boston](#). The purpose of this ordinance is to ensure equity in the City of Boston's cannabis industry and ensure resources are

provided to those disproportionately impacted by the policies enacted under the “War on Drugs”

Under this ordinance, the Mayor’s Office of Economic Opportunity & Inclusion (OEOI) was charged with establishing the Boston Cannabis Equity Program, through which we have developed technical assistance initiatives aimed at providing one-on-one support in various ways, with the overarching objective of fostering economic and entrepreneurial growth and capacity across Boston.

The expectation is that at the conclusion of each project, the business owner will have received the support needed and feel empowered and emboldened to take the next steps toward advancing their business goals. They will have learned what action steps they need to take and how to go about doing it. This project is for the FY25 - FY26 and concludes on January 31, 2026.

We look forward to receiving your response.<sup>1</sup>

## 1.2 SCOPE OF WORK

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

The Mayor’s Office of Economic Opportunity & Inclusion (OEOI) will provide funds to the contractor(s) to provide strategic marketing technical assistance to at least 25 cannabis equity applicants throughout the City of Boston. These services will provide current and prospective business owners with the tools and support needed to establish, sustain, and grow their businesses. Cannabis equity businesses and prospective businesses are identified and selected by the Office of Economic Opportunity & Inclusion (OEOI), in collaboration with the Boston Cannabis Board and other appropriate city departments when applicable. Once selected, OEOI shall

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<sup>1</sup> This WQC follows all applicable requirements for open competition, 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 [This Link](#).

facilitate the initial engagement with the contractor. In each case, the contractor will be expected to work directly with the cannabis equity applicant.

### **1.2.1 Requirements**

The selected vendor is expected to provide the following:

1. One-on-One Technical Assistance: General business consulting including but not limited to:
  - Business Planning: Developing comprehensive business plans outlining goals, strategies, and financial projections to secure funding and guide growth.
  - Application Completion: Providing comprehensive support throughout the application process, from initial preparation to final submission.
  - Meeting & Hearing Preparation: Crafting presentations, preparing talking points, and anticipating and addressing potential concerns from community members and hearing boards.
  - Market Research: Conducting market analysis to identify target demographics, assess competitors, and understand industry trends to inform strategic decision-making.
  - Regulatory Compliance: Advising on complex cannabis regulations at federal, state, and local levels to ensure compliance with licensing, zoning, taxation, and other requirements.
  - Operational Optimization: Evaluating and optimizing business processes, supply chain management, and inventory control to increase efficiency and reduce costs.
  - Financial Management: Guiding budgeting, financial forecasting, cash flow management, and tax planning to optimize performance and mitigate risks.

- **Marketing and Branding:** Developing marketing strategies, branding initiatives, and customer acquisition plans to differentiate the business and attract a loyal customer base.
  - **Human Resources:** Assisting with recruitment, training, performance management, and employee relations to build a skilled and motivated workforce.
  - **Risk Management:** Assessing and mitigating risks related to product liability, security, legal compliance, and market volatility to protect the business and its stakeholders.
  - **Strategic Partnerships:** Facilitating collaborations, joint ventures, and strategic alliances with other businesses, organizations, or industry stakeholders to leverage resources and accelerate growth.
2. **Workshops and Group Sessions:** Provide workshops or workshop series to a group of prospective business owners and/or potential business owners on topics of expertise as the needs and opportunities for such assistance are determined including but not limited to those listed above.
  3. **Technical Assistance Events:** Participate in events hosted by the Mayor's Office of Economic Opportunity & Inclusion, focusing on providing technical assistance.
  4. **Presentations/Testimony:** Participate in hearings and community meetings as necessary on behalf of certified equity businesses.

### **1.2.2 Stakeholder Coordination**

The Office of Economic Opportunity & Inclusion will oversee stakeholder coordination, which encompasses:

1. Connecting the selected vendor with pre-certified and certified equity applicants.

- a. The selected vendor will facilitate direct collaboration with pre-certified and certified equity applicants to determine meeting methods and frequencies for project completion.
2. Managing coordination with all other stakeholders.

### **1.2.3 Reporting**

The selected vendor will be responsible for submitting:

1. Individual project proposals that identify each projects:
  - a. Scope of Services
  - b. Project Length (hrs)
  - c. Fee Proposal
2. Invoices for each one-on-one project, workshop, or technical assistance event they participate in.
3. Feedback on projects and overall participation in the Boston Cannabis Equity Program.

The Office of Economic Opportunity & Inclusion will provide selected vendors with mid-way and end-of-contract reports, detailing:

1. The number of projects completed, along with the associated business, pre-certified applicant, and/or workshop name.
2. The project date.
3. The total project amount.
4. The invoice number and corresponding payment date.

### **1.3 CONTRACT DETAILS**

The term of the contract will be One Year.

- The target implementation dates are January 5, 2025 to [January 31, 2026 (subject to change)
- The maximum budget for this project is \$50,000.00

## I. HOW WE CHOOSE



*This section explains how we will choose the supplier and what we consider a responsive and responsible vendor.*

### 2.1 RULE FOR AWARD

We will award the contract to the responsible and responsive vendor offering the needed quality of supply or service at the lowest price.

*To be considered **responsive**: a quote must contain all the required information, and be submitted before the deadline, and demonstrate that their offering meets the minimum quality requirements or specifications.*

*To be considered **responsible**: a vendor must have the capability, integrity, and reliability to perform the work described in this document.*

Specifically, to be considered responsible and responsive, the vendor for this project must demonstrate:

1. Five (5) years of experience of working with various businesses, including cannabis businesses, minority and women-owned enterprises, and disadvantaged business enterprises
2. Two (2) examples of previous related projects (links to your work, brief descriptions, or short projects will qualify).
3. Five (5) examples of previous experience working with municipalities or public sector clients.
4. A quote outlining your total proposed budget, hourly rates, and other associated costs to serve at least 25 equity applicants.
5. Brief statement outlining your commitment to diversity, equity, and inclusion.

*Note: Your examples may overlap.*

## 2.2 YOUR QUOTE

To show that you meet the requirements to be considered responsible and responsive, please answer the questions below. Feel free to include other information that may be relevant (i.e. graphics or links to your work).

### **Q1: Please explain how you will deliver the services described in the Scope of Work (1-2 pages)**

To demonstrate that you meet the requirements of this Written Quote Contract, focus on:

- What services your organization provides and how long you've been doing this work.
- Your plan to deliver one-on-one work and workshops.
- The basis for your approach.

Response:

### **Q2: Provide the qualifications of the staff who will work on this project (1-2 pages)**

- Identify the key team members who would work on this project & the team structure; if your team includes multiple organizations, please let us know how long you've worked together.
- Document your staff's expertise in delivering general business services to cannabis businesses.
- Describe similar projects they have successfully completed, including



projects that focused on disproportionately impacted communities.

Response:

**Q3: Provide 2-3 references using the template provided below, directly corresponding to the requirements for responsibility & responsiveness.**

<b>REFERENCES</b>		
<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>	<i>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.</i>
	<b>Project Start and End Dates</b>	March 2020 - May 2020
	<b>Expertise Demonstrated by this project (check all that apply and see section 2.1 for more details)</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Experience working with various businesses, including cannabis businesses, minority and women-owned enterprises, and disadvantaged business enterprises</li> <li><input type="checkbox"/> Previous related projects (links to your work, brief descriptions, or short projects will qualify).</li> <li><input type="checkbox"/> Previous experience working with municipalities or public sector clients.</li> </ul>

<b>REFERENCE 1</b>	<b>Organization</b>	
	<b>Project Manager (or equivalent)</b>	
	<b>Phone number</b>	
	<b>Email (if available)</b>	
	<b>Project Description</b>	
	<b>Project Start and End Dates</b>	
	<b>Expertise Demonstrated by this project (check all that apply and see section 2.1 for more details)</b>	<input type="checkbox"/> Experience working with various businesses, including cannabis businesses, minority and women-owned enterprises, and disadvantaged business enterprises <input type="checkbox"/> Previous related projects (links to your work, brief descriptions, or short projects will qualify). <input type="checkbox"/> Previous experience working with municipalities or public sector clients.
<b>REFERENCE 2</b>	<b>Organization</b>	
	<b>Project Manager (or equivalent)</b>	
	<b>Phone number</b>	
	<b>Email (if available)</b>	
	<b>Project Description</b>	
	<b>Project Start and End Dates</b>	
	<b>Expertise Demonstrated by this project (check all that apply and see section 2.1 for more details)</b>	<input type="checkbox"/> Experience working with various businesses, including cannabis businesses, minority and women-owned enterprises, and disadvantaged business enterprises <input type="checkbox"/> Previous related projects (links to your work, brief descriptions, or short projects will qualify). <input type="checkbox"/> Previous experience working with municipalities or public sector clients.

<b>REFERENCE 3</b>	<b>Organization</b>	
	<b>Project Manager (or equivalent)</b>	
	<b>Phone number</b>	
	<b>Email (if available)</b>	
	<b>Project Description</b>	
	<b>Project Start and End Dates</b>	
	<b>Expertise Demonstrated by this project (check all that apply and see section 2.1 for more details)</b>	<input type="checkbox"/> Experience working with various businesses, including cannabis businesses, minority and women-owned enterprises, and disadvantaged business enterprises <input type="checkbox"/> Previous related projects (links to your work, brief descriptions, or short projects will qualify). <input type="checkbox"/> Previous experience working with municipalities or public sector clients.

### 2.3 QUOTE PRICING

DELIVERABLES <i>as defined in the Scope of Work</i>	FIXED PRICE		
One-on-One Technical Assistance			
Workshops and Group Sessions			
Technical Assistance Events			
Presentations/Testimony			
TOTAL FIXED PRICE			
ADDITIONAL SERVICES AS NEEDED	HOURLY RATE	ESTIMATED QUANTITY*	TOTAL PRICE
[INSERT POSITION TITLES]			
<p><i>**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.</i></p>			

Do not email your submission materials. All materials must be submitted online in the City of Boston Supplier Portal, which can be accessed at [boston.gov/procurement](http://boston.gov/procurement). Select the "Supplier Portal" button. You must log into your vendor account in order to access this bidding opportunity EV00015191.

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

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

All vendors are required to **review (but not sign or submit)** the following documents at this stage. By submitting a quote, a respondent acknowledges that if they are selected as the winning vendor, they will be required to complete and provide each of the below forms to the City as part of the contract package:

1. [Form Wage-1](#) – Requirements Of The Boston Jobs, Living Wage, And Prevailing Wage Ordinance
2. [Form Wage-2](#) – The Boston Jobs, Living Wage, And Prevailing Wage Ordinance Vendor Agreement
3. **By submitting a quote, each respondent accepts the terms and conditions listed in forms [CM-10 and CM-11](#), which are incorporated herein by reference.**