

TOWN OF WELLESLEY  
REQUEST FOR PROPOSALS (RFP)  
CONTRACT FOR THE SELECT BOARD OFFICE  
DIVERSITY, EQUITY, AND INCLUSION (DEI) EQUITY AUDIT

**Date Issued:** July 20, 2023

**Due Date for Responses:** Friday, August 18, 2023. Proposals will be accepted no later than NOON.  
**LATE PROPOSALS WILL BE REJECTED.**

**Contract Length:** Estimated timeline for completion of the audit is eight to twelve months.

**Deliver Responses To:** Select Board Office  
C/o Meghan Jop  
Executive Director  
888 Worcester Street, Suite 120  
Wellesley, MA 02482  
Attention: Wellesley DEI Equity Audit

**For Further Information Contact:** Meghan Jop: 781-431-1019 ext. 2200 or  
Email: [mjop@wellesleyma.gov](mailto:mjop@wellesleyma.gov)

**TOWN OF WELLESLEY**

**SELECT BOARD**

**REQUEST FOR PROPOSALS**

**DIVERSITY, EQUITY, AND INCLUSION (DEI) EQUITY AUDIT**

**CONTRACT NO. DEI-23-01**

The Town of Wellesley Select Board, invites proposals for a DEI professional to conduct an Equity Audit.

Interested firms may obtain a copy of the Request for Proposals through the Town of Wellesley Website: <https://www.wellesleyma.gov/Bids> or from the Office of the Town of Wellesley Select Board at [mjop@wellesleyma.gov](mailto:mjop@wellesleyma.gov).

Proposals will be received by the Temporary Office of the Town of Wellesley Select Board, 888 Worcester Street, Wellesley, MA 02482 Suite 120 until 12:00 PM, Friday, August 18, 2023. The Select Board, or their representative, anticipates making an award within 60 days of that date.

All proposals submitted must be completely filled out, signed and enclosed in two sealed envelopes plainly marked:

**"TECHNICAL PROPOSAL"**

DEI- EQUITY AUDIT

THE TOWN OF WELLESLEY, MASSACHUSETTS

SUBMISSION DATE: AUGUST 18, 2023

CONTRACT No. DEI-23-01

and

**"PRICE PROPOSAL"**

DEI- EQUITY AUDIT

THE TOWN OF WELLESLEY, MASSACHUSETTS

SUBMISSION DATE: AUGUST 18, 2023

CONTRACT NO. DEI-23-01

The Select Board reserves the exclusive right to accept or reject any or all proposals in whole or in part, and to waive any informality in proposals received when such action is in the best interest of the Town.

Meghan Jop  
Executive Director of  
General Government Services

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## **1. INTRODUCTION**

In conjunction with the Wellesley Select Board and with the approval of Town Meeting, the Wellesley Diversity, Equity, and Inclusion Task Force intends to select the most advantageous proposal for a consultant to help the Town of Wellesley (“the Town”) expand its diversity, equity, and inclusion (DEI) initiatives and develop a comprehensive, meaningful DEI strategy for the Town. The selection process will include comparative judgments of technical factors, in addition to price. The individual(s)/firm providing these services must have DEI expertise and a broad range of experience working with municipalities and municipal governments. The RFP process will enable the Town to apply qualitative ratings to candidates, prioritizing applicants whose key project personnel have extensive experience providing similar services to other similarly situated towns, particularly where they have been able to work within local objectives and policies within a municipality.

The Town’s Executive Director in consultation with the DEI Task Force shall review, evaluate, and rate each proposer’s technical information. After this rating has been completed, the Town will open price proposals and interview the top three finalists. The Town will award a contract, if at all, to the applicant determined by the Town to be most advantageous, based on the technical and price proposals, and the interview.

### **OBJECTIVES**

The Town seeks a consultant with extensive municipal experience to expand upon the Town’s current DEI initiatives by conducting an equity audit and developing a comprehensive, meaningful DEI strategy for the Town of Wellesley based upon the findings of the equity audit. The consultant will be able to provide recommendations and guidance to the DEI Task Force, Select Board, School Committee, staff across all Town departments, and the community at-large to create more inclusive and equitable Town government operations and services.

With support from the Select Board, School Committee, and Town Meeting, the Wellesley DEI Task Force has determined that the Town should move forward with efforts to create, implement, and maintain a more equitable and inclusive Town. These efforts include identifying immediate actions as well as long-term systemic changes in order to actualize diversity, equity, and inclusion within Town government and the community.

With respect to government, the goals are:

- To increase the diversity of the Town’s workforce, boards, and committees;
- To deliver services in an equitable, caring, fair, and inclusive manner;
- To increase cultural responsiveness and build excellence in communication and customer service for everyone in Wellesley, regardless of race, ethnicity, gender, sexual orientation, age, disability, or any other factor;
- To work with all departments to build support for DEI and to integrate DEI into decision making, policies, practices, procedures, and services;

With respect to the community, the goals are:

- To institutionalize equity, while reinforcing inclusion and affirming diverse identities and experiences;
- To support victims of hate and bias, foster respect, and celebrate differences;
- To build more meaningful engagement with those whose input has historically been at the margins; and
- To provide better access for people who speak a language other than English or have disabilities.

To accomplish these goals, the Town will identify and dismantle barriers, and create plans and policies by partnering with residents, the business community, and other organizations and groups committed to this work. All groups must understand the issues, help determine the strategies, and take action to make lasting change.

The Town must ensure that actions are data driven, when possible, that performance is measured, and that the on-going work is sustainable. Measurable and comprehensive DEI goals are needed:

- To adapt and improve internal culture and operations, external programs and service delivery, and engagement with the community; and
- To build the capacity of Town staff to use an equity lens as the Town continues to create a culture of inclusion and equity.

## **COMMUNITY BACKGROUND**

Wellesley is committed to achieving diversity in our municipal organizations, operations, programs and policy initiatives, and throughout our community.

Through the development and implementation of a [Diversity, Equity, and Inclusion \(DEI\) Task Force](#), the Town of Wellesley seeks to build on the community's stated values and to identify measurable actions that will help create an atmosphere of inclusion in which people of different backgrounds feel valued and have the opportunity to benefit from and contribute to economic prosperity.

According to the 2020 United States Census, Wellesley's population is approximately 29,550, including an estimated 4,000 people living in group quarters such as the dormitories at Wellesley College and Babson College. With a median household income of \$213,684, Wellesley has one of the highest median household incomes in the Commonwealth of Massachusetts. The Town is approximately 78 percent white, 14 percent Asian, 5 percent Hispanic or Latino, 3 percent Black or African American, 4 percent Two or More Races, and .1 percent Native Hawaiian or Pacific Islander. This relative lack of racial diversity presents the biggest challenge to weaving diversity, inclusion, and equity into the fabric of the town. Within the Town of Wellesley, there are 27 departments and approximately 1,325 full-time and part-time Municipal employees. The focus of this equity audit is on both the governmental and community aspects of town. The Wellesley Public Schools serves just over 4,000 students.

The Town has identified the need to establish, implement, and support ongoing initiatives to make Wellesley a community that welcomes diversity, including demographic diversity among residents (race, ethnicity, ability, age), diversity in neighborhoods (housing, schools, open

space), and commercial diversity. In 2019, the Town established a new Comprehensive Plan and Town-wide Strategic Plan known as the [Wellesley Unified Plan](#) which identifies diversity as a guiding principle and priority for implementation. The Unified Plan articulates the core values of the community; establishes a vision for the future of Wellesley; sets town-wide priorities and goals; and provides guidelines on strategies, tools, and specific actions to make the plan a reality. The plan includes a “Vision and Values Statement” for the next 20 years which illustrates Wellesley’s desire to be recognized for its welcoming community culture. Over the years, Wellesley has made strides to address diversity, equity, and inclusion. However, much more work needs to occur, building on past efforts and initiatives.

## **2. SCOPE OF SERVICES**

The following Scope of Services outlines the Town’s minimum requirements for respondents to address in their proposals. The Town is open to additional project components and methodologies that have proven successful in other equity audits. The proposal should be clear in the specific tasks, hours, costs, schedule, and responsibilities for each component and task in the Scope of Services. Following the selection of a consultant team, the Town expects for the lead consultant to meet with Town staff and the DEI Task Force to assist in finalizing scope and tasks; team roles; and priorities.

- A. DEI Community Audit: Data collection and data analysis to identify the overall needs of the community and town government around DEI, including such areas as allocation of resources; baseline conditions in the Town, areas for improvement, and developing a program to measure and assess progress on an ongoing basis.
- B. DEI Organizational Audit: Conduct an analysis and develop a baseline report of current organizational practices, services, systems, policies, programs, processes, protocols, initiatives, organizational structure, staffing and awareness throughout all town departments, boards, and committees.
- C. Review existing Town/School DEI work, such as past survey results, in an effort to complement and build upon existing efforts.
- D. Provide insight and knowledge on DEI best practices of municipal governments with a focus on operationalizing equity.
- E. Provide insight and knowledge on DEI best practices as related to municipal Human Resources Departments and recommendations for Wellesley’s HR Department in the areas of recruiting, hiring, training, promoting, and retaining a diverse and inclusive workforce and having an inclusive and equitable culture in Wellesley’s work environment.
- F. Develop shared language, a framework, a public statement of principles, and a mission regarding DEI. Leverage language already used in the [Wellesley Public Schools’ Racial Climate Report](#) (starting on page 11), and in the [WPS’ Equity Plan](#).
- G. Work with key community members and business leaders to guide the DEI analysis, understand the status quo, and consider possible DEI strategies for the broader community.
- H. Review and evaluate programming and services provided to marginalized residents, particularly in the areas of social services, practices for building an inclusive town, as well as best practices for community-based advisory committees.
- I. Review and evaluate Town initiatives in the business, non-profit, and economic development sectors in relationship to DEI including a focus on contracting and housing policies.

J. DEI Training: Review current DEI training and recommend the content, type, and quantity of future diversity, equity, and inclusion trainings for Town employees at all levels, Town elected officials, Board and Committee members, and the Wellesley community. Any training recommendations shall be based on recent research and have been proven effective in reducing biased behavior, enabling communication, and improving workplace and community culture. Provide a way to measure progress for ongoing learning, training, and engagement. The Town will make available all information regarding Town departments, including job descriptions, department personnel information, reports, policies, and other materials as may be necessary for the proposer to successfully conduct a review that will assist in developing a comprehensive, thoughtful DEI strategy for the Town of Wellesley.

K. Identify and make recommendations to address the concerns and interests of Town employees and residents from underrepresented groups.

L. Make recommendations that identify and address barriers to equity, inclusion, and belonging that increase internal awareness, knowledge, and skills.

M. Make recommendations regarding long-term monitoring and evaluation that consider several areas, including but not limited to, internal staffing practices, policies and procedures, community partnerships and engagement, and ongoing education for Town employees, Boards, Committees, and community.

### **3. INSTRUCTIONS TO PROPOSERS**

#### **A. GENERAL**

All proposals must be submitted in accordance with Massachusetts General Laws Chapter 30B, Section 6. Proposals must be received by the Executive Director, Town of Wellesley, Massachusetts on or before **noon on Friday, August 18, 2023**, at the Select Board Office, 888 Worcester Street, Suite 120, Wellesley, MA 02482. Please put to the attention of the Wellesley DEI Equity Audit. Proposals delivered after the appointed time and date will not be considered.

#### **EMAIL AND FAXED PROPOSALS WILL NOT BE ACCEPTED.**

#### **B. SUBMISSION OF PROPOSAL**

Each respondent must submit one proposal package clearly marked “Wellesley DEI Equity Audit” on the outside of the envelope. Each envelope shall contain two sealed envelopes, one marked “Town of Wellesley DEI Equity Audit – Technical Proposal” and the other marked “Town of Wellesley DEI Equity Audit – Price Proposal”. Respondents shall provide one (1) original and one (1) electronic copy of the Technical Proposal, and one (1) original and one (1) electronic copy of the Price Proposal. All proposals shall be delivered to:

Select Board Office  
C/o Meghan Jop, Executive Director  
888 Worcester Street, Suite 120  
Wellesley, MA 02482  
Attention: Wellesley DEI Equity Audit

All proposals must be submitted by NOON on August 18, 2023 (the “Proposal Due Date”) when they become the property of the Town and are subject to applicable Public Record Laws. **Late proposals will not be accepted.** Postmarks will not be considered. It is the responsibility of the respondent to ensure timely delivery of proposals.

**IF PRICE IS INCLUDED IN THE TECHNICAL PROPOSAL, THE PROPOSAL MAY BE DISQUALIFIED.**

**C. QUESTIONS**

Questions shall be submitted by July 28, 2023, in writing to the Select Board, C/o Meghan Jop, Executive Director, 888 Worcester Street, Suite 120, Wellesley, Massachusetts 02482 or in email to: [mjop@wellesleyma.gov](mailto:mjop@wellesleyma.gov) . Responses to timely submitted questions will be in writing and will be sent to those requesting the RFP and posted online as addenda to the RFP.

**D. PROPOSAL ACCEPTANCE:**

The Town will give notice of the acceptance of the proposal and intention to award a contract by emailing copies of the contract to the winning proposer. Upon receipt of the contract, the successful Proposer shall deliver it, duly signed, and properly executed, within ten (10) calendar days of receipt of the notice of acceptance with all required documentation. If the successful Proposer fails to execute the Agreement within such time, the Town may accept another proposal. The failure of any Proposer to examine the Agreement documents shall not relieve it from the obligations it will incur if its proposal is accepted. The Town reserves the right to reject any or all proposals, or any part(s) thereof, if in the best interest of the Town to do so, and to amend the Agreement as the Town deems to be in its best interest. The Town reserves the right to waive any mistakes or informalities in the proposals received and may request supplementary information from any Proposer if it determines that the granting of such waiver or the receipt of such additional information would be in the best interest of the Town. Each out-of-state Proposer shall furnish with its proposal a certification from the Office of the Secretary of State verifying that it is legally authorized to do business in the State of Massachusetts. Any proposal which fails to include any material information or documentation specified in the proposal submission requirements is considered non-responsive and will be rejected.

**E. PROPOSAL EXPENSES:**

Expenses for developing the proposals are entirely the responsibility of the Proposer and shall not be chargeable in any manner to the Town.

**F. Procurement Timeline:**

RFP Released:	July 20, 2023
Questions due in writing:	July 28, 2023
Addenda w/answers posted:	August 4, 2023
Proposal Submittal due:	August 18, 2023 by NOON

**G. Proposal Format:**



All proposals shall follow the order of this RFP. All proposals shall have a table of contents denoting, for each item, which page it can be located on. All proposals shall have footers with page numbers.

#### 4. ADDITIONAL REQUIREMENTS

- A. Meetings: Throughout the process it is required that the consultant communicate and meet frequently with the Town and DEI Task Force.
- B. Deliverables: The consultant is expected to provide a written report, written recommendations, and a presentation to the Select Board.
- C. Expenses: All travel and related expenses associated with this project shall be included in the overall lump sum price proposal that is not to exceed **\$100,000**.
- D. Insurance: The successful consultant will indemnify the Town of Wellesley at the time of contract execution against any and all losses and damages by the provision of liability insurance, required Worker's Compensation insurance, and such other coverage as may be required by law.

#### 5. PERFORMANCE TIMELINE

The successful consultant must be ready to commence project work within fourteen (14) calendar days of the contract award. Any deviation from this schedule must be clearly stated in the consultant's response to the proposal, and any delay to start should be negotiated between the parties. The equity audit should be completed no later than the end of the month of June 30 2024, unless the deadline is extended by mutual agreement.

#### 6. PROPOSAL CONTENT AND SUBMISSION REQUIREMENTS

- A. Non-Price/Technical Proposal: All Technical Proposals shall include the following information. **No reference to the price of the services to be provided should be included anywhere in the Technical Proposal.**
  - 1. The proposer's name, address, and telephone number;
  - 2. Name, telephone number, and email address of designated contact person for this project;
  - 3. A description of the general skills of the firm, including a description of the consultant's familiarity with DEI and work with municipalities;
  - 4. Resumes of the principal(s) who will be providing the services under this contract, including the number of hours each principal is expected to devote to this project;
  - 5. A Plan of Services describing the manner in which the consultant will fulfill the Scope of Services as outlined in 2. Scope of Services of this RFP and the proposed timetable for project completion;
  - 6. A list of all projects of similar nature and magnitude performed by the consultant within the last five (5) years, including the client's name address, telephone number, contact person, and brief project description;
  - 7. Samples of work, such as a comprehensive work product for another municipality, including a copy of a plans and subsequent recommendations, with appropriate confidentiality;

8. Signed Certificate of Non-Collusion (Appendix A) and Statement of State Tax Compliance using the forms attached to this RFP (Appendix B);
9. Completed Qualifications and References Form attached (D); and

**B. Price Proposal:** Bidders shall submit in a separate, sealed envelope one (1) signed lump sum Price Proposal. The Price Proposal should include the form found in Appendix C. The lump sum amount must include all related costs, including travel, photocopying, mailing, telephone and shall not exceed \$100,000.00. The proposer shall also provide a rate for service at an hourly rate for any additional work requested by the Town that is not in the Scope of Services.

**C. Minor Informalities.** The Town may waive any minor informalities, as defined in M.G.L. c. 30B, §2, in the proposal process, or allow the vendor to correct them. Other minor errors will be clarified consistent with Chapter 30B.

**D. Non-Responsive Proposals.** Proposals that are incomplete, not properly endorsed or signed, or which are contrary to the instructions provided in this RFP may be rejected.

## **7. SELECTION AND EVALUATION PROCESS**

There will be no public opening of submitted proposals. Following the deadline for receipt of proposals, the Executive Director will open the Technical Proposals and prepare a register of those firms submitting proposals which shall be available for public inspection. All proposal contents shall be confidential until the evaluation is final, and award has been made.

The Technical Proposals shall be evaluated by an Executive Director and DEI Task Force; the Evaluators shall prepare their evaluations based on the criteria contained herein.

Any proposer submitting a proposal must satisfy all the Minimum Evaluation Criteria, below.

Proposals that do not demonstrate compliance with the Minimum Evaluation Criteria set forth in Part 8 may be rejected as nonresponsive. All proposals not rejected as non-responsive shall be evaluated based on the six (6) Comparative Criteria in Part 9.

The Town reserves the right to waive minor informalities in any or all RFPs, or to reject any or all RFPs, if it be in the public interest to do so. The Town reserves the right to request site visits and demonstrations of existing vendor operations.

Upon completion of the evaluation of the responsive Technical Proposals, the Price Proposals will be opened, whereupon the Town will determine which is the most advantageous taking into consideration cost and evaluative criteria. The Town reserves the right to reject any and all proposals and to award a contract as determined to be in the best interests of the Town. All proposals shall remain firm for ninety (90) calendar days after the proposal opening.

## **8. MINIMUM EVALUATION CRITERIA**

The RFP Minimum Evaluation Criteria are as follows:

1. The proposer must demonstrate that it has experience in the areas outlined in the Scope of Services.
2. The proposer must demonstrate it has worked with municipalities.
3. The proposer must demonstrate knowledge and experience with DEI Strategic Plans.
4. The proposer must demonstrate expertise in thought leadership, human centered design, research, and data analytics;
5. The proposer must have experience in training, coaching, and facilitating people from diverse racial and ethnic professional backgrounds.
6. The proposer must contain a comprehensive description of services to include how the respondent intends to provide the services requested in the RFP. This description shall include, but not be limited to:
  - a. how the project will be managed and scheduled,
  - b. how the data and materials will be collected,
  - c. how the data and materials will be delivered,
  - d. communication and coordination, and the working relationship between the respondent and the Town.
7. Management Proposal that includes project team structure and internal controls as well as staff qualifications and experience.

## **9. COMPARATIVE EVALUATION CRITERIA**

Proposals from contractors who meet or exceed the Minimum Criteria will be evaluated and rated on the basis of the following Comparative Evaluation Criteria. The Town reserves the right to ask any proposer to provide additional supporting documentation in order to verify its response.

Ratings of Highly Advantageous (HA); Advantageous (A); Not Advantageous (NA); or Unacceptable (U) will be given to each of the following criteria for each respondent. A composite rating will then be determined. A composite rating of Highly Advantageous or Advantageous may be assigned only if a proposal has received at least one such rating among the Comparative Evaluation Criteria listed below.

To the extent that a Comparative Criterion requires the certification of fact, the proposer's certification as to that fact shall be an adequate response provided, however, that on request the proposer shall provide to the Town such evidence as the Town may request to support that fact.

Proposals which meet the Minimum Evaluation Criteria will be evaluated based on the following rubric:

### **A. EXPERIENCE**

Highly Advantageous: Consultant has substantial experience in work related to DEI and municipalities with more than 5 successful projects.

Advantageous: Consultant has adequate experience in work related to DEI and municipalities with less than 5 successful projects.

Not Advantageous: Consultant has minimal experience in work related to DEI.

## B. COMPLETED EVALUATION AND ASSESSMENT EXERCISES

Highly Advantageous: Consultant has completed a substantial number of evaluation and assessment exercises for municipalities.

Advantageous: Consultant has completed an adequate number of evaluation and assessment exercises for municipalities.

Not Advantageous: Consultant has completed a minimal number of evaluation and assessment exercises for municipalities.

## C. STAFF

Highly Advantageous: Consultant assigns a principal consultant and a project team who have demonstrated excellence in work related to DEI and municipalities.

Advantageous: Consultant assigns a principal consultant and a project team who have demonstrated competency in work related to DEI.

Not Advantageous: Consultant assigns a principal consultant and a project team who have not demonstrated excellence or competency in work related to DEI.

## D. PLAN OF SERVICES

Highly Advantageous: Consultant has a well-defined and developed Plan of Services in response to this Request For Proposals and demonstrates a clear understandable implementation strategy.

Advantageous: Consultant has a sufficiently defined and developed Plan of Services in response to this Request For Proposals and demonstrates an adequate but not exceptional implementation strategy.

Not Advantageous: Consultant has an inadequately defined and developed Plan of Services in response to this Request For Proposals and demonstrates an undefined implementation strategy.

## E. REFERENCES

Highly Advantageous: Consultant provides multiple references who give the consultant an overall rating of “highly advantageous.”

Advantageous: Consultant provides limited references who give the consultant an overall rating of “highly advantageous.”

Not Advantageous: Consultant provides an inadequate number of references of whom rates the consultant as “highly advantageous.”

## F. INTERVIEW

In addition to the foregoing, the Town will interview proposers. Interviews shall be given only to the 3 proposers ranking highest in Comparative Evaluation Criteria A-E above.

Highly Advantageous: Consultant receives an overall rating of “highly advantageous” from the interview panel based upon materials provided, clarity of presentation and public presentation skills, and the depth of understanding the unique needs of a municipality as it pertains to DEI.

Advantageous: Consultant receives an overall rating of “advantageous” from the interview panel based upon materials provided, clarity of presentation and public presentation skills, and the depth of understanding the unique needs of a municipality as it pertains to DEI.

Not Advantageous: Consultant receives an overall rating of “not advantageous” from the interview panel based upon materials provided, clarity of presentation and public presentation skills and the depth of understanding the unique needs of a municipality as it pertains to DEI.

## 10. RULE FOR AWARD

The contract substantially similar to the Town-Contractor Agreement attached hereto as Appendix F will be awarded to that proposer deemed by the Executive Director and DEI Task Force to have submitted the most advantageous proposal taking into consideration the price and non-price proposals. The Town reserves the right to interview the top three (3) finalists. The Town reserves the right to reject any and all proposals as determined to be in the best interests of the Town.

## 11. QUESTIONS AND INQUIRIES

It is the responsibility of the Consultant to inquire about and question any material contained in this RFP which is not fully understood or that is believed to be susceptible to more than one interpretation. Any inquiries or requests for clarification regarding this RFP should be submitted by July 28, 2023, in writing, addressed to:

Select Board Office  
C/o Meghan Jop  
Executive Director  
888 Worcester Street, Suite 120  
Wellesley, MA 02482  
Attention: Wellesley DEI Equity Audit

or emailed to: [mjop@wellesleyma.gov](mailto:mjop@wellesleyma.gov)

If any response to such inquiries affects the content of this RFP, then the Town shall provide its response in writing, with a copy to each proposer of record.

## **APPENDIX A**

### **CERTIFICATE OF NON-COLLUSION: REQUIRED FORM**

The undersigned certifies under the penalties of perjury that this bid or bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business partnership, corporation, union, committee, club or other organization, entity or group of individuals.

\_\_\_\_\_  
Signature of person submitting contract/bid

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Business

\_\_\_\_\_

## **APPENDIX B**

### **CERTIFICATE OF TAX COMPLIANCE**

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

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*Social Security Number or*

*Federal Identification Number*

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*Signature of Individual or*

*Corporate Name*

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*Corporate Officer  
(if applicable)*

**APPENDIX C**  
**PRICE PROPOSAL FORM**  
(To be place in a separate sealed envelope)

Consultant Services  
TOWN OF WELLESLEY  
DEI Equity Audit  
Wellesley, MA 02482

CONTRACTOR

PROPOSER

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PROJECT:    Consultant Services for DEI Equity Audit

Proposed Price (in words): \_\_\_\_\_

Proposed Price (in numbers): \$\_\_\_\_\_

Please attach estimated budget and breakdown by planning element of professional service fees, assigned project staff and hourly billing rates of staff.

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Title

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date Signed



## APPENDIX D

### MINIMUM EVALUATION CRITERIA FORM

(1) Does the Respondent team structure identify all of the participants and include their qualifications and experience? Does the team have at least five (5) years of experience in DEI work?

Yes

No

(2) Has the Respondent successfully completed a minimum of three (3) similar projects within the last five (5) years?

Yes

No

(3) Can the Respondent demonstrate expertise in thought leadership, human centered design, research, and data analytics?

Yes

No

(4) The Respondent can immediately initiate work and follow through with the project in a timely and professional manner?

Yes

No

(5) The Respondent has shown strong skills in facilitation of large and small public meetings and managing the process of collaborative public participation?

Yes

No

(6) The Respondent has shown a successful project management approach including data and material collection, and presentation and delivery of information?

Yes

No

(7) The Respondent has shown a successful project management approach including data and material collection, and presentation and delivery of information?

Yes

No