



REQUEST FOR PROPOSALS: (M.G.L. Ch. 30B) Age Strong Transportation Program Consultant

AGE+

AGE STRONG COMMISSION
EMILY SHEA, COMMISSIONER
EV00018018

PROJECT SUMMARY:

The City of Boston Age Strong Commission is seeking an experienced transportation consultant to evaluate the current state of our transportation program and create an actionable plan to modernize and integrate our different transportation services into one cohesive offering. This plan will include both near-term improvements that can be implemented with modest time and resource investments and a strategic vision of what the Age Strong Transportation Program should look like long-term. These recommendations will remove operational bottlenecks and ensure our transportation offerings remain accessible and relevant to our constituents.

IMPORTANT DATES:

EVENT	DATE
RFP Issue Date	October 12, 2026, 12pm ET
Pre-Proposal Q&A Conference Call Location Zoom/Teams link	October 21, 2026, 11am ET https://www.zoomgov.com/j/1655132853?pwd=Cdl3pResu2hcgaGWO74EeoMHwb6dtx.1Meeting ID: 165 513 2853 Passcode: 214201
Proposal Due Date	November 9, 2026, 3pm ET

**See the full RFP schedule in Section 1.3.*

CONTACT INFORMATION:

Alison Freeman | alison.freeman@boston.gov

All questions should be emailed with the **RFP number (EV00018018)** in the subject line.

You can access this RFP and related documents on the City of Boston Supplier Portal, via boston.gov/procurement.

INSTRUCTIONS FOR VENDORS

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, and get assistance by emailing 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, attend the information session on October 21, 2026, 11am ET or email questions to alison.freeman@boston.gov by October 23, 2026, 5pm.
- 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

TABLE OF CONTENTS:

I. INTRODUCTION AND PURCHASE DESCRIPTION	6
1.1 BACKGROUND	6
1.2 SCOPE OF SERVICES	7
1.2.1 Overview	7
1.2.2 Phase 1: Current State Assessment	7
1.2.3 Phase 2: Near-Term Improvements	8
1.2.4 Phase 3: Long-Term Strategic Planning	9
1.2.5 Project Milestones	10
1.3 PROPOSAL TIMELINE	10
1.4 WHAT TO DO IF YOU HAVE QUESTIONS	11
1.5 CONTRACT TERM AND OTHER INFORMATION	11
II. HOW WE CHOOSE	12
2.1 MINIMUM EVALUATION CRITERIA	13
2.2 COMPARATIVE EVALUATION CRITERIA	13
III. YOUR TECHNICAL PROPOSAL	18
3.1 COVER PAGE	18
3.2 RESPONSE TO SCOPE OF SERVICES	19
3.3 OWNERSHIP DETAILS (INFORMATIONAL ONLY)	23
3.4 REFERENCES	24
3.5 INSURANCE DOCUMENTATION	26
IV. YOUR PRICE PROPOSAL	26
4.1 PRICE PROPOSAL (REQUIRED)	27
4.2 SUPPLEMENTAL INFORMATION (OPTIONAL)	27
V. SUBMISSION INSTRUCTIONS	28
5.1 SUBMISSION DEADLINE	28
5.2 SUBMISSION METHODS	28
5.3 IMPORTANT SUBMISSION GUIDELINES	28
5.4 LATE SUBMISSIONS	28
5.5 CHECKLIST FOR SUBMITTING PROPOSAL	29
5.6 SUBMITTING PROPOSAL VIA BOSTON'S SUPPLIER PORTAL	29
5.7 SUBMITTING VIA MAIL / PHYSICAL DELIVERY	31
VI. APPENDICES	33
APPENDIX 1: RFP TERMS AND CONDITIONS	33
APPENDIX 2: CONTRACT TERMS AND CONDITIONS	34
APPENDIX 3: INSURANCE REQUIREMENTS	35

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

The City of Boston Age Strong Commission ("Age Strong") serves older adults (ages 60 and older) across Boston's neighborhoods by offering programs and services that promote healthy aging, community connection, and independence. Accessible and reliable transportation is a critical pillar of this mission.

Currently, the Age Strong Transportation Program consists of three separate offerings:

1. **Free Age Strong Shuttle:** City-operated van shuttle providing free, door-to-door transportation for non-emergency medical appointments and essential errands.
2. **Healthy Rides Program:** Subsidized individual transportation options for flexible point-to-point transit.
3. **Taxi Coupon Program:** Subsidized coupon program offering discounted private taxi rides for Boston seniors.

While these services each play an important role in Age Strong's larger transportation program, they currently function in relative isolation. With this Request for Proposals (RFP), we are seeking an experienced transportation consultant to evaluate the current

state of our transportation program and create an actionable plan to modernize and integrate our services into one cohesive offering. This plan will include both near-term improvements that can be implemented with modest time and resource investments and a strategic vision of what the Age Strong Transportation Program should look like long-term.

The selected contractor will help Age Strong transition from managing three disconnected offerings to operating a **single, unified, and modernized mobility network** that dynamically matches riders to the appropriate transit mode based on individual need, availability, and cost efficiency.

We look forward to receiving your proposal.

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

This project will leverage a phased approach, in which each phase of work will build on findings and deliverables from the previous phases. During the first phase, the vendor will conduct a current state assessment review of Age Strong’s Transportation Program, evaluating the efficacy and reach of each of Age Strong’s transportation offerings. During the second phase of work, the vendor will use their findings from the first phase to come up with a list of prioritized recommendations that can be implemented in the near-term (defined as 12-24 months from project completion). During the third phase of work, the vendor will take a long-term strategic view of our program, identifying where we should make investments and major program changes in the next 2-10 years. **We envision a highly collaborative engagement, in which the vendor works with representatives of multiple Age Strong teams to create deliverables that are specific to the City of Boston. All deliverables must be accepted and approved by Age Strong for work to be considered complete.**

1.2.2 Phase 1: Current State Assessment

During the first phase of work, the consultant will conduct an assessment of the three offerings in Age Strong’s Transportation Program (Free Age Strong Shuttle, Healthy Rides Program, Taxi Coupon Program), generating data that will be used to inform

recommendations in Phases 2 and 3 of the project. The consultant will leverage a combination of quantitative and qualitative methods during this phase of work, including statistical analysis of raw data provided by Age Strong or collected by the consultant, surveys, and interviews with Age Strong staff and constituents. The questions the consultant will work to answer during this phase include, **but are not limited to:**

- What is the current utilization of the Age Strong Transportation Program and how has it changed over the past 5-10 years? Based on historical data and current trends, what are the projections for the next 5-10 years?
- What neighborhood populations utilize the Age Strong Transportation Program? At what rate do neighborhood populations use each of the Age Strong Transportation Program offerings?
- What are constituents' current levels of satisfaction with the Age Strong Transportation Program? Where do they perceive its greatest strengths and areas for improvement?
- How do Boston's transportation offerings for older adults compare to peer cities in the United States?

A component of the current state assessment will include an assessment of senior transportation programs in peer cities with comparable sizes and demographics to Boston. Based on their background knowledge and research during this phase of work, the consultant will develop Key Performance Indicators/measures of effectiveness and benchmark Boston against peer cities in those areas.

The consultant's findings from this phase of work will be packaged into a final report, which will be reviewed by Age Strong staff. After incorporating any edits, the consultant will conduct a readout of the report with Age Strong leadership and answer any questions they have. The consultant will document their feedback and incorporate it into subsequent phases of work.

1.2.3 Phase 2: Near-Term Improvements

During the second phase of work, the consultant will identify **near-term opportunities for improvements** to the Age Strong Transportation Program, which we define as improvements that can be implemented within the next 12-24 months. **For each opportunity, we expect to see the anticipated benefit, affected riders, estimated cost, staffing implications, implementation difficulty, dependencies, timeframe, and responsible party.** We anticipate that these recommendations will include a combination of "quick wins" that will produce results with minimal time and resource investments, and opportunities that require greater investment but can still be implemented within the

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specified timeframe. We envision this as a collaborative phase of work, in which the consultant conducts an initial brainstorm with Age Strong staff, generates an initial list of recommendations, and revises them based on staff feedback. This approach will ensure that the recommendations the consultant creates are actionable, relevant, and realistic. The questions we hope the consultant can help us answer during this phase of work include, **but are not limited to:**

- How can we boost utilization of our transportation offerings? What are the best ways to reach our target audience and what organizations should we partner with?
- How can the teams that manage our different transportation offerings work more effectively together? What are the best ways for us to coordinate and share information?
- How can we match constituents with the best transportation offering for their individual needs?
- How can the Age Strong Shuttle more effectively use scheduling software (current software or other) to increase efficiency and incorporate real-time traffic data?
- What should the makeup of the Age Strong Shuttle fleet be, given rates of different ride types (individual versus group), fuel efficiency, and vehicle lifecycles?
- What is the Age Strong Shuttle's current staffing capacity and does the existing workforce structure align with current and projected rider demand?

1.2.4 Phase 3: Long-Term Strategic Planning

During the third phase of work, the consultant will take a **long-term strategic view** of the Age Strong Transportation Program, providing us with recommendations on how we can build a program that is relevant, future-proofed and financially sustainable. We will be looking for a few different 5- to 10-year scenarios, for example a baseline, moderate-investment, and expanded-service model, with the costs, staffing, fleet, funding, and expected rider benefits associated with each. The questions we hope the consultant can help us answer during this phase of work include, **but are not limited to:**

- How will emerging trends in transportation (e.g., micro-transit, TNC evolution, automated dispatch, demographic shifts) impact Age Strong and how can we integrate them into our current and future offerings?
- How can we use emerging technologies, such as automation, integrated scheduling, and decision-support tools to assess rider eligibility, evaluate trip requirements, and match riders with the optimal mode of transportation? What are other ways we can use technology to add value to our program?
- How can we unify our offerings into a single mobility ecosystem rather than three standalone operations? How can we match riders with the most appropriate mode of transportation based on functional needs, destination, timing, and urgency? Are

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there opportunities for further integration of the Age Strong transportation program into the city's broader transportation ecosystem (i.e. MBTA, Blue Bikes)?

- What is a realistic, multi-year financial sustainability model for Age Strong's subsidized offerings (Taxi Coupon and Healthy Rides)?
- What are the opportunities and drawbacks to pursuing MassHealth reimbursement for eligible Shuttle rides?
- How should we allocate limited operating and grant funds across our current offerings? Are there opportunities to streamline our current offerings and/or implement new programs that better serve the evolving needs of older adults?
- What long-term budget projections, unit-cost benchmarks, subsidy structures, and financial safeguard mechanisms can we establish to ensure fiscal sustainability of our programs?

1.2.5 Project Milestones

Phase	#	Milestone	Deadline*
Phase 1	1	Acceptance of consultant's finalized research plan by Age Strong.	January 4, 2027
Phase 1	2	Submission of draft current state assessment to Age Strong for review.	March 1, 2027
Phase 1	3	Final acceptance of current state assessment and executive readout with Age Strong leadership.	March 29, 2027
Phase 2	4	Brainstorming workshop with Age Strong staff.	April 12, 2027
Phase 2	5	Final acceptance of near-term improvement recommendations.	June 30, 2027
Phase 3	6	Final acceptance of long-term strategic plan.	September 24, 2027

*These dates are tentative and subject to change based on project needs.

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.

EVENT	DATE*
RFP Released	October 12, 2026, 12pm ET
Pre-Proposal Q&A	October 21, 2026, 11am ET https://www.zoomgov.com/j/1655132853?pwd=Cdl3pResu2hcgaGVo74EoMHwb6dtx.1Meeting ID: 165 513 2853 Passcode: 214201
Questions Due to the City Via email to alison.freeman@boston.gov	October 23, 2026, 5pm
Consolidated Q&A Posted by the City ¹	October 30, 2026
Deadline for Proposals See <i>Submission Instructions for Details</i>	November 9, 2026, 3pm ET
Vendor Interviews/Demonstrations	Week of November 9, 2026
Contractor Selected	November 18, 2026

1.4 WHAT TO DO IF YOU HAVE QUESTIONS

Vendors can ask questions live during the **Pre-Proposal Q&A Conference Call** (information in the table above).

Outside of the Q&A Conference Call and before the proposal deadline, all communications must be **emailed to alison.freeman@boston.gov** with the **EV00018018** in the subject line.^{2,3}

1.5 CONTRACT TERM AND OTHER INFORMATION

¹ 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. *All times are in Eastern Time

² 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.

³ **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.

CONTRACT TERM*



Contract Dates	December 14, 2026 - September 30, 2027
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Maximum Budget	\$200,000
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Payment Type	Milestone-based
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*Not to exceed 3 years except as articulated in 30B s. 12(b). Contract will be awarded to the most advantageous proposal based on a holistic evaluation of the technical proposal and price proposal

Additional Details

- **Payment Terms & Milestone Acceptance:** Payment will be made upon satisfactory completion, verifiable documentation, and formal acceptance of each milestone as outlined in **Section 1.2 Scope of Services**. Invoices must include deliverable proof to satisfy federal drawdown justification rules (2 CFR § 200.308 / 2 CFR § 200.328).
- **Invoice Submissions:** All invoices must clearly reference the deliverable(s) completed and be submitted via email to angel.robinson@boston.gov and myles.gerraty@boston.gov
- **Inclusive Pricing & Federal Travel Compliance:** All quoted prices must be **inclusive of potential travel, administrative time, and incidental expenses**. No additional reimbursements will be made beyond the agreed milestone-based pricing. Any travel embedded in milestone pricing must comply with federal travel cost principles under **2 CFR § 200.475**.
- **Federal Funding & Pass-Through Terms:** This procurement is funded under a federal award from the **Administration for Community Living (ACL)**. The selected contractor must comply with all applicable federal laws, regulations, and executive orders, including 2 CFR Part 200 (Uniform Guidance), 2 CFR Part 300, and HHS non-discrimination mandates.

II. HOW WE CHOOSE



This section explains how we will evaluate respondents. 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 below is “not responsive” and will be eliminated from further consideration.

#	MINIMUM EVALUATION CRITERION	DETAILS/REQUIREMENTS
1	Bid Submission	Was the bid submitted by the deadline , appropriately completed, and truthful?
2	Separations of Technical/Price Proposals	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	Forms and Documentation	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 CLARITY	
RATING CATEGORY	DESCRIPTION
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.

CRITERIA 2: VENDOR QUALIFICATIONS AND EXPERIENCE	
RATING CATEGORY	DESCRIPTION
Highly Advantageous	• Demonstrates significant and strong technical experience in transportation planning, including mobility management or public transit types of services. • Demonstrates a proven track record in the program evaluation, design, reform, and optimization of public or subsidized transportation programs. • Demonstrates a track record of success in managing complex projects of similar size and scope, meeting deadlines and budget. • Demonstrates extensive experience (7+ years) in working with public sector stakeholders.

	• The proposal includes examples of past work that are highly relevant to this project and highlight competency in designing, restructuring, or reforming public or subsidized transportation programs.
Advantageous	• Demonstrates technical experience in transportation planning, including mobility management or public transit types of services. • Demonstrates experience working with public or subsidized transportation programs. • Demonstrates a track record of successes in completing projects within their allotted timeframe and budget. • Demonstrates general experience (4-6 years) working with key public sector stakeholders. • The proposal includes examples of past work that are somewhat relevant to this project.
Not Advantageous	• Demonstrates limited experience in transportation planning, including mobility management or public transit types of services. • Demonstrates limited knowledge of and experience with public or subsidized transportation programs. • Demonstrates a limited track record of success in completing projects within their allotted timeframe and budget. • Demonstrates limited experience (fewer than 4 years) working with public sector stakeholders.

CRITERIA 3: RESPONSE TO SCOPE OF SERVICES

RATING CATEGORY	DESCRIPTION
Highly Advantageous	The proposal includes comprehensive responses to each deliverable requested in the Scope of Services, along with a detailed project plan. A thoughtful and feasible approach to collaboration among key stakeholders is included. The proposal is tailored to the specific goals and context of the City of Boston.
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.

2.3 INTERVIEWS/DEMONSTRATIONS

An additional component of this evaluation process will include a(n) interview. We anticipate these taking 30 minutes and occurring during the week of November 9, 2026. Interviews will consist of an opening presentation by the vendor (no more than 20 minutes) outlining their technical proposal, followed by questions by Age Strong staff. 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 4: INTERVIEW, DEMONSTRATION/ OR SITE VISIT

RATING CATEGORY	DESCRIPTION
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. Key staff are included in the demonstration, and all questions posed by the City were specifically addressed.
Advantageous	Presenters are organized. Presentation demonstrates understanding of the City's requirements, as described in the RFP.
Not Advantageous	Presenters are poorly organized. Presentation does not demonstrate an understanding of the City's requirements, as described in the RFP. The vendor is not able to answer key questions posed by the City.

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.

- (3.1) Cover Page
- (3.2) Response to Scope of Services
- (3.3) Ownership Details (Informational only)
- (3.4) References
- (3.5) Insurance Documentation

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	
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

Q1: ORGANIZATION OVERVIEW

QUESTION:

Please explain why your organization is best-suited to manage this RFP. *Suggested length: 1–2 paragraphs*

An ideal answer will include:

- Services your organization provides;
- How long you've provided these services;
- Your organizational structure;
- Your strategy;
- Any relevant awards your team has received.

RESPONSE:

Q2: PROJECT TEAM

QUESTION:

Who will work on this project, and why are they best qualified to achieve the goals of this RFP? *Suggested length: 1–3 paragraphs*

An ideal answer will include:

- Description of the project team;
- List of key team members;
- Justification for why they'll be great partners (bios/resumes);
- Description of team structure.

RESPONSE:

Q3: MULTIPLE ORGANIZATIONS/PRIME AND SUBCONTRACTORS

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

ORGANIZATION NAME	PRIME OR SUB?	HOW LONG YOU HAVE WORKED TOGETHER
	Prime Contractor	
	Subcontractor	
	Subcontractor	
	Subcontractor	
	Subcontractor	

Q4: IMPLEMENTATION PLAN

QUESTION:

What is your implementation plan?

Describe how you accomplish the objectives outlined in the Scope of Services within the contract timeframe. Include a project timeline and identify all staff involved with critical tasks and milestones.

An ideal answer will include

- An understanding of the nuances of navigating local government;
- A thoughtful approach to stakeholder collaboration throughout each phase of the project;
- Your approach to ensuring that your recommendations are meaningful and relevant to Age Strong's unique context.

RESPONSE:

Q5: SUBJECT MATTER EXPERTISE

QUESTION:

Describe your knowledge of the transportation sector, including current and emerging trends that may impact this project. *Suggested length: 1-2 pages*

An ideal answer will include:

- Your organization's experience and expertise in the transportation sector;
- Understanding of current transportation challenges and opportunities relevant to this project;
- Knowledge of emerging trends (e.g., mobility technologies, sustainability initiatives, equity considerations, multimodal integration);
- How you stay informed about developments in the transportation field;
- Your perspective on how current or future trends will shape the approach to this project;
- How you will ensure your recommendations are relevant to Boston's unique context.

RESPONSE:

Q6: PREVIOUS EXPERIENCE

QUESTION:

Please describe 2-3 similar projects you have successfully completed. If possible, choose examples that highlight your experience planning, evaluation, and designing public or subsidized transportation programs. *Suggested length: 1-2 pages*

An ideal answer will include:

- The size and scope of the program;
- Challenges you encountered and how you overcame them;

- The outcomes you achieved;
- Key learnings or takeaways you'll apply to this project.

RESPONSE:

Q7: DATA

QUESTION:

Please describe how you will use data to drive meaningful insights throughout each phase of this project. Suggested length: 3-5 paragraphs

An ideal answer will include:

- Your approach to collecting, analyzing, and reporting on relevant data;
- How you will translate data into actionable recommendations;
- Examples of data visualization or reporting tools you would use;
- Your process for sharing insights with City stakeholders.

RESPONSE:

Q8: CONTRACT AND PERFORMANCE HISTORY

QUESTION:

RESPONSE

Have you had a contract terminated for default during the past five (5) years, or have you been involved in litigation regarding a contract?⁴

- Yes
- No

⁴ **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

If “Yes”, please describe your position on the matter(s).

RESPONSE:

3.3 OWNERSHIP DETAILS (INFORMATIONAL ONLY)

OWNERSHIP DETAILS (INFORMATIONAL ONLY)	
QUESTION	RESPONSE
Is your organization a small, local, minority-owned, women-owned, and/or veteran-owned business? ⁵	• Small • Local • Minority-Owned • Women-Owned • Veteran-Owned
Is your organization certified as a small, local, minority-owned, women-owned, and/or veteran-owned business with the City of Boston?	• Yes • No
Are any of your proposed subcontractors a small, local, minority-owned, women-owned, and/or veteran-owned business? ⁶	• Yes • No
If you are not certified but would like to be, visit boston.gov/departments/supplier-diversity for information on how to apply. Becoming a certified small, local, minority-owned, women-owned, and/or veteran-owned business with the City of Boston provides you with many opportunities: • Targeted outreach for released procurements • Support building your business and navigating the procurement process • Access to the new Inclusive Quote Contract procurements, which provide a simpler way for businesses to get into government contracting.	

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.

⁵ 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.

⁶ Same as above.

3.4 REFERENCES

EXAMPLE REFERENCE	
FIELD	EXAMPLE ENTRY
Organization	Smith Events
Project Manager (or equivalent)	Jennifer Smith
Phone Number	845-111-2222
Email (if available)	jsmith@smithevents.com
Project Description	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.
Project Start and End Dates	March 2020 – May 2020
Expertise Demonstrated by this Project (see section 2.1 for more details)	Stakeholder Engagement, Project Design, Accessibility

REFERENCE 1	
FIELD	EXAMPLE ENTRY
Organization	
Project Manager (or equivalent)	
Phone Number	
Email (if available)	
Project Description	
Project Start and End Dates	
Expertise Demonstrated by this Project (see section 2.1 for more details)	

REFERENCE 2	
FIELD	EXAMPLE ENTRY
Organization	
Project Manager (or equivalent)	
Phone Number	
Email (if available)	
Project Description	
Project Start and End Dates	
Expertise Demonstrated by this Project (see section 2.1 for more details)	

REFERENCE 3	
FIELD	EXAMPLE ENTRY
Organization	
Project Manager (or equivalent)	
Phone Number	
Email (if available)	
Project Description	
Project Start and End Dates	
Expertise Demonstrated by this Project (see section 2.1 for more details)	

3.5 INSURANCE DOCUMENTATION



Review the City's required insurance coverage for this scope of work. This can be found in [Appendix 3](#).

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

RESPONSE:

IV. YOUR PRICE PROPOSAL



The **Price 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 the entire contract length 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:

- 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).

4.1 PRICE PROPOSAL (REQUIRED)

DELIVERABLES AS DEFINED IN THE SCOPE OF WORK	FIXED PRICE
Milestone 1	\$ _____
Milestone 2	\$ _____
Milestone 3	\$ _____
Milestone 4	\$ _____
Milestone 5	\$ _____
Milestone 6	\$ _____
TOTAL FIXED PRICE	



Note: 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,

All materials should be submitted online in the City of Boston Supplier Portal, which can be accessed at boston.gov/procurement. Select the “Supplier Portal” button. You must log into your vendor account in order to access this bidding opportunity EV00018018.

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 technical and price proposals.

5.1 SUBMISSION DEADLINE

To be considered, each bidder **must submit a complete bid before November 9, 2026, 3pm ET.**

- See [Section 5.5](#) for the bid checklist and required documents.

Proposal edits and updates can only be submitted BEFORE the deadline.

5.2 SUBMISSION METHODS

Bidders may submit their completed bids using **one of the following methods:**

- **Electronically via the City of Boston Supplier Portal**
(see [Section 5.6](#) for instructions)
- **By mail or physical delivery**
(see [Section 5.7](#) for mailing details and in-person drop-off locations)

5.3 IMPORTANT SUBMISSION GUIDELINES

Technical Issues

If submitting via the [City of Boston Supplier Portal](#), bidders should **submit early** to allow time for troubleshooting any system errors.

Bid Confirmation

The contact listed in your bid will receive periodic email updates regarding:

- Confirmation of bid receipt
- Notification of bid award or rejection
- Requests for any follow-up information, if needed

5.4 LATE SUBMISSIONS

Late bids will NOT be considered. The City is unable to accept bids that are submitted after the deadline or that fail to meet submission requirements.

5.5 CHECKLIST FOR SUBMITTING PROPOSAL

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

CHECKLIST ITEM	COMPLETE (✓)
IMPORTANT: Submit separate technical and price proposals. (Do NOT include any price information in your technical proposal; otherwise your proposal will be rejected).	
A. TECHNICAL PROPOSAL	
Included a cover page with all required information	•
Responded to all questions and prompts in the “Response to Scope of Services” section	•
Provided three (3) references using the template in Section 2.2	•
B. PRICE PROPOSAL	
Provided a detailed budget and pricing form	•
Provided additional information about pricing proposal (optional)	•
Price proposal submitted separately from technical proposal	•
C. REVIEW CONTRACT TERMS AND CONDITIONS	
Reviewed all contract terms, conditions, and additional forms	•
If awarded the contract, acknowledged the requirement to sign and submit forms listed in Appendix 2	•
Completed and submitted the CM-16 Wage Theft Prevention Certification	•

5.6 SUBMITTING PROPOSAL VIA BOSTON'S SUPPLIER PORTAL

Vendors **may submit** proposals electronically through the **Supplier Portal**.

Access the portal via boston.gov/procurement – **Supplier Portal link**.

For Full Instructions (PDF), follow the steps in the official guide: [Entering a Bid Online \(PDF\)](#)

STEP	ACTION	DETAILS/LINKS
1. Register (if you not already have an account)	Register as a “bidder” in the Supplier Portal. Note: you will need to register as a vendor if awarded	How to Use the Supplier Portal provides step-by-step registration instructions.
2. Find Event	Locate the RFP (Request for Proposals) you want to respond to.	1. Log in to your account. 2. Navigate: Main Menu → Manage Events and Place Bids → View Events and Place Bids. 3. Enter “EV00018018” in the search box and click Search. 4. Click “Age Strong Transportation Program Consultant.” 5. Click View Event Package to download forms and documentation. – Start with “Age Strong Transportation Program Consultant.” 6. Click OK to return to the Event Details page.
3. Attach Your Bid	Upload your bid documents.	1. Click Bid On Event. 2. Answer all questions and upload the required forms as directed, including the non-price technical proposal. Do NOT include <u>any</u> price information in your technical proposal, otherwise your proposal will be rejected 3. 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

4. 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)		
4. Submit Your Bid	Validate and finalize submission.	1. Click Validate Entries to confirm readiness. 2. Click Submit Bid to complete submission.

More information on registering and submitting bids is available on the **Procurement Information Page**.

Recommended: Submit at least **24 hours prior to the deadline**.

Important Note: Modifications may be made after submission but not after the proposal due date. Please ensure your proposal is complete and accurate prior to the deadline.

5.7 SUBMITTING VIA MAIL / PHYSICAL DELIVERY

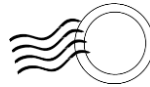
You may submit hard copies of the Technical and Price Proposals by mail, delivery service, or in person. **If you choose to submit a hard copy, you must submit two separate envelopes: a complete Technical Proposal in one sealed envelope and a Price Proposal in a second sealed envelope.**

The envelopes should be clearly marked as follows:

ENVELOPE 1: TECHNICAL PROPOSAL FORMAT (include <u>no reference to pricing</u>)	
Age Strong Transportation Program Consultant RFP Number: EV00018018 TECHNICAL PROPOSAL Submitted by: [Name of Vendor] [Date Submitted]	
Alison Freeman Age Strong Commission Room 271 1 City Hall Square Boston, MA 02201	

ENVELOPE 2: PRICE PROPOSAL FORMAT

Age Strong Transportation Program Consultant
RFP Number: EV00018018
PRICE PROPOSAL
Submitted by: [Name of Vendor]
[Date Submitted]



Alison Freeman
Age Strong Commission
Room 271
1 City Hall Square
Boston, MA 02201

VI. 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 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
8. [Truck Side Guard Ordinance](#) – Applies to contractors using vehicles over 10,000 lbs and semi-trailers with a total weight exceeding 26,000 lbs. Full ordinance [here](#).

9. Certificate of Insurance - Proof of insurance per the guidelines in Appendix 3

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 Accord 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. **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.
4. **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.
5. **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
6. **Professional Liability (Errors & Omissions)** 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.