

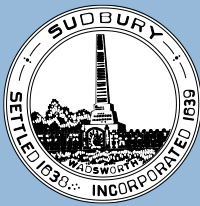
SUDBURY SELECT BOARD  
TUESDAY JUNE 21, 2022  
7:00 PM, ZOOM

Item #	Time	Action	Item
	7:00 PM		CALL TO ORDER
<b>EXECUTIVE SESSION</b>			
1.		<i>VOTE</i>	Vote to immediately enter Executive Session pursuant to Exemption 3 (G.L. c. 30A, §21(a)(3)) - Discussion and vote on whether to join proposed petition to Federal Surface Transportation Board concerning status of MBTA right of way.
2.		<i>VOTE</i>	Continue Executive Session to conduct strategy sessions in preparation for negotiations with non-union personnel or to conduct collective bargaining sessions or contract negotiations with non-union personnel pursuant to G.L. c. 30A, s. 21(a)(2) (Interim Town Manager contract and Town Manager search).
3.		<i>VOTE</i>	Vote to close executive session and resume open session.
	8:00 PM		Opening remarks by Chair
			Reports from Town Manager
			Reports from Select Board
			Citizen's comments on items not on agenda
<b>MISCELLANEOUS</b>			
4.		<i>VOTE</i>	Ratify vote taken in Executive Session regarding Sudbury Interim Town Manager contract
5.		<i>VOTE</i>	Discussion and possible vote on Town Manager Search Firm RFP/RFQ.
6.			Citizen's Comments (cont)
7.			Upcoming agenda items
<b>CONSENT CALENDAR</b>			
8.		<i>VOTE / SIGN</i>	Vote to approve a Sunday Entertainment License for Bullfinch's, Inc., d/b/a Bullfinch's Restaurant, 730 Boston Post Road, for a live music duo (flute and accordion) from 5:00 p.m. to 8:00 p.m. on

*These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law. Some items may be taken out of order or not be taken up at all. The Chair will strive to honor timed items as best as possible, however, the estimated timing may occasionally be inaccurate.*

<b>Item #</b>	<b>Time</b>	<b>Action</b>	<b>Item</b>
			Sunday, June 26.

*These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law. Some items may be taken out of order or not be taken up at all. The Chair will strive to honor timed items as best as possible, however, the estimated timing may occasionally be inaccurate.*



SUDBURY SELECT BOARD

Tuesday, June 21, 2022

**EXECUTIVE SESSION**

**1: Executive Session re: STB**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Vote to immediately enter Executive Session pursuant to Exemption 3 (G.L. c. 30A, §21(a)(3)) - Discussion and vote on whether to join proposed petition to Federal Surface Transportation Board concerning status of MBTA right of way.

Recommendations/Suggested Motion/Vote: Vote to immediately enter Executive Session pursuant to Exemption 3 (G.L. c. 30A, §21(a)(3)) - Discussion and vote on whether to join proposed petition to Federal Surface Transportation Board concerning status of MBTA right of way.

Background Information:

Financial impact expected:

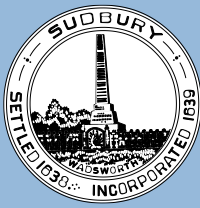
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

06/21/2022 7:00 PM



SUDBURY SELECT BOARD  
Tuesday, June 21, 2022

**EXECUTIVE SESSION**

**2: Conduct strategy session re:Interim TMgr contract**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Continue Executive Session to conduct strategy sessions in preparation for negotiations with non-union personnel or to conduct collective bargaining sessions or contract negotiations with non-union personnel pursuant to G.L. c. 30A, s. 21(a)(2) (Interim Town Manager contract and Town Manager search).

Recommendations/Suggested Motion/Vote: Continue Executive Session to conduct strategy sessions in preparation for negotiations with non-union personnel or to conduct collective bargaining sessions or contract negotiations with non-union personnel pursuant to G.L. c. 30A, s. 21(a)(2) (Interim Town Manager contract and Town Manager search).

Background Information:

Financial impact expected:

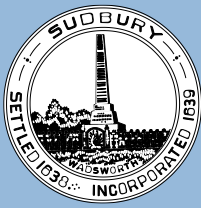
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

06/21/2022 7:00 PM



SUDBURY SELECT BOARD  
Tuesday, June 21, 2022

**EXECUTIVE SESSION**  
**3: Close executive session**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Vote to close executive session and resume open session.

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

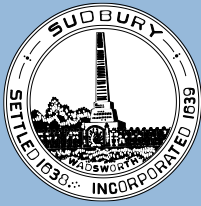
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

06/21/2022 7:00 PM



SUDBURY SELECT BOARD  
Tuesday, June 21, 2022

**MISCELLANEOUS (UNTIMED)**

**4: Ratify vote taken in Executive Session**

REQUESTOR SECTION

Date of request:

Requestor: Chair Russo

Formal Title: Ratify vote taken in Executive Session regarding Sudbury Interim Town Manager contract

Recommendations/Suggested Motion/Vote: Ratify vote taken in Executive Session regarding Sudbury Interim Town Manager contract.

Background Information:

Financial impact expected:

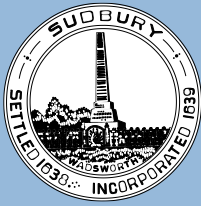
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

06/21/2022 7:00 PM



SUDBURY SELECT BOARD  
Tuesday, June 21, 2022

**MISCELLANEOUS (UNTIMED)**

**5: Vote on Town Manager Search Firm RFP/RFQ**

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts

Formal Title: Discussion and possible vote on Town Manager Search Firm RFP/RFQ.

Recommendations/Suggested Motion/Vote:

Background Information:  
attached RFPs provided by Town Counsel Lee Smith - redlined and final copies.

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

06/21/2022 7:00 PM

**From:** Lee S. Smith <[LSmith@k-plaw.com](mailto:LSmith@k-plaw.com)>  
**Sent:** Thursday, June 16, 2022 4:27 PM  
**To:** Bilodeau, Maryanne <[BilodeauM@sudbury.ma.us](mailto:BilodeauM@sudbury.ma.us)>  
**Subject:** Town Manager Search Firm Procurement Methods

You have asked me to present the options available to procure the services of an executive search firm to assist with the recruitment of Sudbury's next Town Manager. As you know, the procurement of services for a municipality is governed by G.L. c. 30B. Based upon the last contract procured for these services, it is anticipated that the contract will be for less than \$50,000.

For contracts between \$10,000 and \$50,000, advertisement is not required. Rather, three or more written quotes may be solicited from persons that customarily provide the services sought. Under this procurement method, the contract is to be awarded to the responsible party offering the services at the lowest price quote provided. I estimate that this type of procurement could be completed with a contract awarded within approximately one month.

Alternatively, the procurement may be done by using competitive sealed proposals procedures, i.e. a request for proposals (RFP). Under this type of procurement, you specify that the selection of the most advantageous offer requires comparative judgments of factors in addition to price. With this method, comparative factors used to evaluate the proposers and their "technical proposal" are set forth in the RFP and the proposers are rated according to a numerical scale by the reviewing parties. A "price proposal" is submitted in a separate envelope. The reviewing parties will determine the most advantageous proposal from a responsible and responsive proposer taking into consideration the price proposed and the stated evaluation criteria. This method of procurement will likely take considerably longer as the RFP should be advertised, the response requested is considerably more detailed, and interviews may be held (although this is optional). I estimate that awarding a contract pursuant to an RFP could take approximately three months.

The RFP method was used in the last procurement for these services and a revised and updated draft of an RFP has been provided for your consideration.

Lee S. Smith, Esq.  
 KP | LAW  
 101 Arch Street, 12th Floor  
 Boston, MA 02110  
 O: (617) 654 1809  
 C: (617) 699 2935  
 F: (617) 654 1735  
[lsmith@k-plaw.com](mailto:lsmith@k-plaw.com)  
[www.k-plaw.com](http://www.k-plaw.com)

This message and the documents attached to it, if any, are intended only for the use of the addressee and may contain information that is PRIVILEGED and CONFIDENTIAL and/or may contain ATTORNEY WORK PRODUCT. If you are not the intended recipient, you are hereby notified that any dissemination of this communication is strictly prohibited. If you have received this communication in error, please delete all electronic copies of this message and attachments thereto, if any, and destroy any hard copies you may have created and notify me immediately.



TOWN OF SUDBURY  
Select Board  
278 Old Sudbury Road  
Sudbury MA 01776

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REQUEST FOR PROPOSALS

SEARCH FIRM TO ASSIST WITH TOWN MANAGER RECRUITMENT

OVERVIEW

The Town of Sudbury is seeking to recruit a Town Manager, the fifth in the Town's history. The Town adopted the position of Town Manager when the Board of Selectmen-Town Manager Special Act was enacted in 1994. The Town Manager reports to a 5-person Select Board and is assisted in their work by an Assistant Town Manager and a dedicated team of Senior Managers, department heads and employees. The Town is also fortunate to be served by both elected and appointed volunteer Boards, Commissions and Committees who take an active role in the governance of the Town. Sudbury, a community of more than 18,000 residents, has an open Town Meeting form of government.

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Following is the Scope of Services for the Town of Sudbury for consultant or executive recruitment services for the recruitment of a Town Manager. It is important that the process includes public participation and input from a wide variety of stakeholders. The appointee to the Town Manager position will serve in accordance with the Special Act. The link to the Special Act is posted on the Town's website at [https://cdn.sudbury.ma.us/wp-content/uploads/sites/342/2014/08/TownManagerAct\\_1993.pdf?version=1c8dad11ab91f8f992510496a57368ee](https://cdn.sudbury.ma.us/wp-content/uploads/sites/342/2014/08/TownManagerAct_1993.pdf?version=1c8dad11ab91f8f992510496a57368ee)

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SCHEDULE AND TIME LINE

The Request for Proposals (RFP) will be available in the Sudbury Select Board's Office, Sudbury Town Building, 278 Old Sudbury Road, Sudbury MA 01776, after 9:00 AM on [redacted]. The RFP is available via email by contacting Patty Golden in the Select Board's office at:

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[goldenp@sudbury.ma.us](mailto:goldenp@sudbury.ma.us).

Inquiries involving procedural or technical matters related to the Request for Proposals shall be submitted in writing and received no later than three (3) business days prior to the time the proposals are due as stated in the advertisement, and must be directed:

Via US Mail:  
Patty Golden  
Senior Administrative Assistant to the Town Manager  
Select Board's Office  
278 Old Sudbury Road  
Sudbury, MA 01776

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or Via Fax:  
978-443-0756

Attachment5.b: Town Manager Exec Search Firm RFP 6-16-22 redlined from Lee (5330 : Vote on Town Manager Search Firm RFP/RFQ)

\_\_\_\_\_ or Via Email:  
goldenp@sudbury.ma.us

Proposals will be received until 10:00 a.m. (Boston time) on \_\_\_\_\_.  
**E-MAILED AND FAXED PROPOSALS WILL NOT BE ACCEPTED.** It is the proposer's sole responsibility to submit the proposal before the deadline, and the Town is not responsible for delays in deliveries, deliveries attempted when Town offices are closed, mistakes in deliveries, or any other reason for a proposal that is not submitted prior to the deadline

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Interviews of qualified proposers, if any will be held during the months of August or September. The award of this contract, if any, will be no later than sixty (60) days after the deadline for the submission of proposals. In accordance with the provisions of M.G.L. c. 30B, § 5 and 9, the Town of Sudbury reserves the right to waive any informality in any or all proposals, or to reject any or all proposals, if it is in the public's best interest to do so.

**SCOPE OF WORK**

The Town of Sudbury seeks proposals from executive search consultants experienced in recruiting municipal executives in Massachusetts to assist the Town in recruiting highly qualified candidates for Sudbury's next Town Manager.

The Consultant shall work with the Select Board, Senior Staff of the Town, and an appointed Screening Committee to actively source, recruit, evaluate suitability of, interview and refer qualified candidates to the Town of Sudbury for the position of Town Manager.

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The scope of work will include, but not be limited to, a process which includes the following:

- Consultant shall assist the Select Board, Senior Staff, and designated Screening Committee in soliciting community input and feedback regarding the traits and management style desired in a new Town Manager. This item shall include assistance in developing the process for soliciting opinions, creating vehicles for eliciting stakeholder feedback and compiling results and publishing conclusions. Consultant will present a written report to the Select Board with findings and recommendations from stakeholder interviews and other information gathering efforts.
- Consultant shall assist the Select Board in establishing selection criteria for evaluating Town Manager candidates.
- Consultant shall work with the Select Board and Interim Town Manager to develop descriptive documents for prospective candidates. The descriptive documents shall include background statements and expectations regarding the Town Manager position for prospective candidates as well as marketing information regarding the Town for distribution to prospective candidates.

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- Consultant shall conduct networking and other search activities to generate a diverse pool of highly qualified prospective candidates who meet the Select Board's selection criteria. These activities shall include, at a minimum, publishing the vacancy using regional and national means. Consultant shall focus on identifying potential candidates, screening them for suitability with the Town of Sudbury, motivating them to interview for the position of Town Manager.
- Consultant shall work with the Select Board, and Screening Committee to review resumes of qualified applicants, schedule interviews with the Screening Committee and, with finalists, with the Select Board. Consultant shall provide training and guidance to the Screening Committee and Select Board in areas of human resources best practices and legal requirements and instructions applicable though the process.
- Consultant shall check references on finalists, extend the offer of employment, review benefits, and generally assist in the hiring process in ways and at the times requested by the Select Board or the Town's Human Resources department.
- Consultant shall provide sufficient notification to all candidates who applied but were not selected for initial interviews and, also for those interviewed but not offered the position.
- Consultant shall act at all times in an attentive, ethical, and responsible manner so as to represent the Town of Sudbury with the utmost concern for its interests, goals and image with candidates, other communities, and members of the general public.

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The Select Board reserves the right to not hire any of the candidates provided by the consultant.

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The Select Board reserves the right to hire a candidate not recommended or provided by the consultant.

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**PROPOSAL SUBMISSION REQUIREMENTS**

Failure to submit documents requested may result in the Town's determination that a proposal is non-responsive unless the Town deems such a failure to be a minor informality.

There are two components to the Proposal:

- A) Technical Proposal, including information about the proposer, references, and the services to be provided; and
- B) Price Proposal, including a fixed price fee for services to be rendered under the terms of the contract.

**A) TECHNICAL PROPOSAL**

The following documentation must be contained in the Technical Proposal to prove responsiveness to each required element. Technical Proposals received without the required documentation for each required element may be deemed unresponsive. Technical Proposals must be arranged in the order specified below, with responses and documentation separated by tabs or index dividers. Each page of the Technical Proposal must contain a footer with the page number.

Required Elements of the Technical Proposal:

- Table of Contents, showing where required information can be found by section and page.
- Letter of Interest, including the firm's history and the name of the principal or "lead consultant" who will be assigned to work directly with the Town on this search. Proposers are directed to note that the contract will require that the same principal or "lead consultant" be assigned to this contract for the duration of the search process, through and including the hiring of a Town Manager for the Town of Sudbury.
- An Organizational Chart, if the Proposer is a firm or corporation, indicating the name and position of all consultants who will work with the Town on this search. If the Proposer is not a firm or corporation, the Proposer should so state in this section.
- Current Resume(s), including summaries of credentials and number of years of experience providing executive municipal search services for the lead consultant assigned to Sudbury and any additional consultants who will be assigned to work with the Town on this search.
- Description of the Proposer's Approach and Plan for performing services outlined in the Scope of Work (see above), including:
  - Description of how the Proposer will specifically identify and target the needs of the Town in the search for a new Town Manager;
  - Description of the consultant's approach to ensuring community involvement and input;
  - Description of proposed candidate recruitment strategies;
  - Description of the consultant's proposed implementation plan;
  - Proposed timeline with specific milestones;
  - List of Recent Contracts, including name, address and telephone number, of all communities for which the firm has provided similar Town Manager or Town Administrator search services during the past five (5) years and specific persons to contact;
  - References, for a minimum of three (3) comparable executive search projects completed in the past five (5) years;
  - Promotional Material, including advertisements, brochures and other recruitment materials used in Town Manager/Town Administrator searches or promotional literature about the firm;
  - Signed Certificate of Non-Collusion (Included as Attachment A to this RFP);
  - Signed Certificate of Payment of Taxes (Included as Attachment B to this RFP)

B) PRICE PROPOSAL

- The Price Proposal form, included as Attachment C, must be completed and included as the proposer's Price. Proposer's price shall include the cost of any advertisements, solicitations, or other collateral materials associated with the recruitment effort and any other out of pocket costs associated with the project.
- The Price Proposal (one original copy) must be submitted without conditions or exceptions and must be submitted **under separate cover and in a sealed envelope.**

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- Price Proposals shall remain in effect for a period of 60 (sixty) calendar days from the date of proposal submittal or until it is formally withdrawn, a contract is executed, or this Request for Proposal is canceled, whichever occurs first.
- Price Proposals submitted without the required form or including other conditions of pricing may be deemed unresponsive.

**PROPOSAL SUBMITTAL**

Technical and Price Proposals must be submitted in separate sealed envelopes and plainly marked as follows: “TECHNICAL PROPOSAL-Sudbury Town Manager Search”, and “PRICE PROPOSAL-Sudbury Town Manager Search” along with the name of the consultant, consulting firm or executive recruiter clearly marked on both envelopes.

IF PRICES ARE INCLUDED WITHIN THE TECHNICAL PROPOSAL, THE PROPOSAL WILL BE DISQUALIFIED.

- Technical Proposals should be sealed in a separate envelope with one (1) original, nine (9) hard copies, and one (1) CD or thumb drive.
- Price Proposals should be submitted in a sealed envelope of one (1) signed original.

- Both sealed proposals must be submitted together in one envelope or mailer and received in the Select Board’s office no later than 10:00 a.m. (Boston time), Monday, to:

Patty Golden  
 Senior Administrative Assistant to the Town Manager  
Select Board’s Office  
 278 Old Sudbury Road  
 Sudbury, MA 01776

E-MAILED AND FAXED PROPOSALS WILL NOT BE ACCEPTED. ANY PROPOSALS DELIVERED AFTER THE SUBMITTAL DEADLINE WILL NOT BE CONSIDERED AND WILL BE RETURNED UNOPENED.

It is the proposer’s sole responsibility to submit the proposal before the deadline, and the Town is not responsible for delays in deliveries, deliveries attempted when Town offices are closed, mistakes in deliveries, or any other reason for a proposal that is not submitted prior to the deadline. The names and addresses of all parties submitting proposals will be recorded and the proposals will then be provided to the Select Board and/or their designees selected to evaluate the proposals.

**EXAMINATION OF DOCUMENTS**

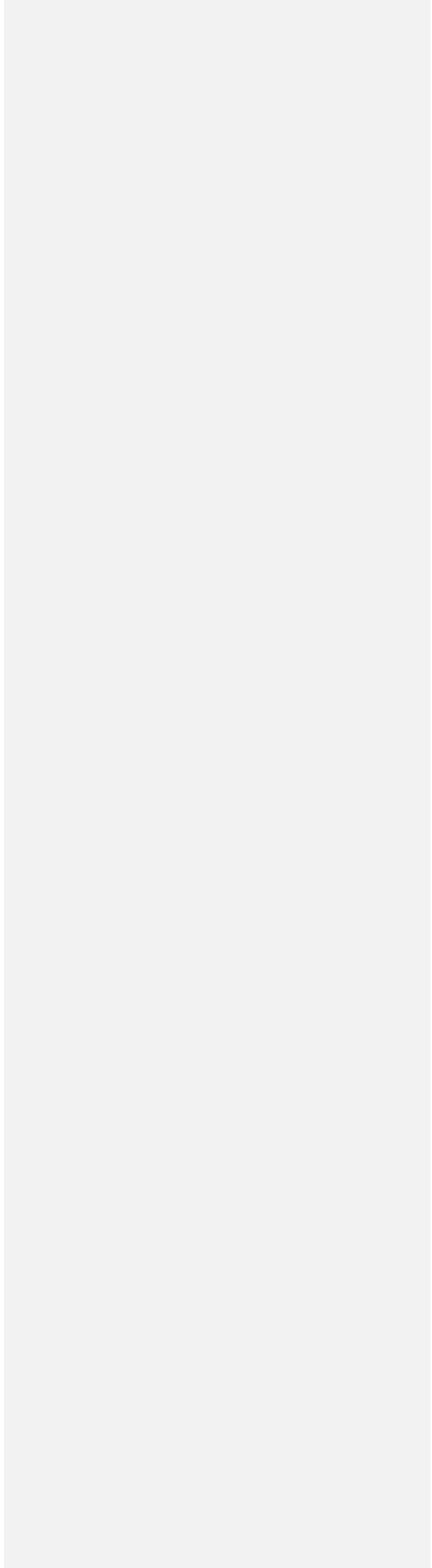
Each Proposer shall be satisfied as to the requirements of the contemplated services to enable the intelligent preparation of this proposal. The Proposer shall be familiar with all submittal and RFP requirements before submitting the proposals in order that no misunderstanding shall exist in regard to the nature and character of the contemplated services to be performed. No allowance

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will be made for any claim that the proposal is based on incomplete information as to the nature and character of the area or contemplated service.



## EVALUATION OF PROPOSALS

Technical Proposals will be opened and evaluated by the Select Board and/or its designees who will individually rate the proposals. Evaluation of Technical Proposals will be based on weighted, comparative criteria described in this section. The following scale will be used to evaluate each criterion, as well as to determine a composite rating for each proposal:

- Highly Advantageous (3 points)
- Advantageous (2 points)
- Not Advantageous (1 point)
- Unacceptable (0 points)

### Proposer's Networking Strategies

**Highly Advantageous:** The Proposal provides more than three (3) examples of how the Proposer's established networks of professional municipal contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

**Advantageous:** The Proposal provides three (3) examples of how the Proposer's established networks of professional municipal contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

**Not Advantageous:** The Proposal provides fewer than three (3) examples of how the Proposer's established networks of professional municipal contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

**Unacceptable:** The Proposal does not include specific examples of networks the Proposer will use in the search and recruitment process.

### Proposer's Experience/Key Personnel

**Highly Advantageous:** The Proposer has five (5) or more years' experience in conducting successful executive searches with municipalities and other government or non-profit organizations, and during that period has concluded at least three (3) successful searches for a Town Manager/Town Administrator in Massachusetts, one of which must have been for a municipality of similar size and demographics to Sudbury. The Proposer's lead consultant has more than five (5) years' experience conducting Town Manager/Town Administrator searches in Massachusetts.

**Advantageous:** The Proposer has at least three (3) years' experience in conducting successful executive searches with municipalities, government and other non-profit organizations, and during that period has concluded at least two (2) successful executive searches for a Town Manager/Town Administrator in Massachusetts. The Proposer's lead consultant has at least three (3) years' experience conducting Town Manager/Town Administrator searches in Massachusetts.

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**Not Advantageous:** The Proposer has fewer than three (3) years' experience in successful executive searches with municipalities, government and other non-profit organizations, and during that period has concluded only one successful executive searches for a Town Manager/Town Administrator in Massachusetts. The Proposer's lead consultant has fewer than three (3) years' experience conducting Town Manager/Town Administrator searches in Massachusetts.

**Unacceptable:** The Proposer has fewer than three (3) years' experience in executive search and hiring processes and has not concluded any successful executive searches for a Town Manager/Town Administrator. The Proposer's lead consultant has no experience conducting a Town Manager/Town Administrator search in Massachusetts.

Proposer's Approach to Ensuring Community Involvement

**Highly Advantageous:** The Proposal provides more than three (3) project examples where the proposed Lead Consultant for Sudbury Town Manager/Town Administrator search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a Town Manager/Town Administrator.

**Advantageous:** The Proposal provides three (3) project examples where the proposer Lead Consultant for Sudbury Town Manager/Town Administrator search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a Town Manager/Town Administrator.

**Not Advantageous:** The Proposal provides fewer than three (3) project examples where the proposer Lead Consultant for Sudbury Town Manager search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a Town Manager.

**Unacceptable:** The Proposal provides fewer than three (3) project examples where the proposed Lead Consultant has organized, trained and facilitated working groups as part of an executive search process, none of which has led to the hiring of a Town Manager.

Proposer's Implementation Plan and Schedule

**Highly Advantageous:** The Proposal includes a detailed description and examples of previously successful recruitment strategies and includes a clearly delineated timeline with specific milestones for Sudbury's Town Manager search.

**Advantageous:** The Proposal includes an outline of some candidate recruitment strategies and an implementation plan that includes some milestones for Sudbury's Town Manager search.

**Not Advantageous:** The Proposal lacks specific candidate recruitment strategies or specific milestones for Sudbury's Town Manager search.

**Unacceptable:** The Proposal does not include any information about a proposed implementation plan and schedule.



Proposer’s References

**Highly Advantageous:** All five (5) references were satisfied with the Proposer's work and stated that all executive search tasks were completed within the time frame required.

**Advantageous:** All five (5) references were satisfied with the Proposer's work and stated that all executive search tasks were completed but not within the time frame(s) required.

**Not Advantageous:** Fewer than five (5) references were satisfied with the end results.

**Unacceptable:** The preponderance of references were dissatisfied with the end results.

Proposer’s Recruitment Materials

**Highly Advantageous:** The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least five (5) different Town Manager searches with the proposal, at least one (1) of which involves a Town Manager search in Massachusetts.

**Advantageous:** The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least three (3) different executive searches with the proposal, at least one (1) of which involves a Town Manager/Town Administrator search in Massachusetts..

**Not Advantageous:** The Proposer includes three (3) or fewer samples of advertisements, brochures, and other forms of candidate outreach with the proposal, none of which involve a Town Manager/Town Administrator search.

**Unacceptable:** The Proposer does not include samples of advertisements, brochures or other forms of candidate outreach.

All Technical Proposals will be given a cumulative ranking based on individual rankings of the following weighted elements, using a scoring sheet included as Attachment D: Proposer's Networking Strategies, Proposer's Experience/Key Personnel, Proposer's Approach to Ensuring Community Involvement, Proposer's Implementation Plan and Schedule, Proposer's Recruitment Materials, and Proposer’s References.

The Town of Sudbury ~~Select Board~~ and/or their designees ~~may~~ invite all Proposers to be interviewed who submitted the most advantageous Technical Proposals, taking into consideration all of the Technical Proposal criteria, and have most advantageous overall evaluation ratings. Interviews will be ranked as follows:

**Highly Advantageous:** The Lead Consultant for this project was present, clearly stated a plan of action, demonstrated excellent communications skills, presented other personnel with experience and skills who will be assigned for the duration of this project, and successfully responded to all questions.

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**Advantageous:** The Lead Consultant for this project was present, outlined a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project, and successfully responded to most of the questions.

**Not Advantageous:** The Lead Consultant for this project was present but did not present a clear plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on this project and/or who would not be assigned for the duration of this project, or did not successfully respond to questions.

**Unacceptable:** The Lead Consultant for this project was not present at the interview or was unable to communicate effectively and did not successfully respond to questions.

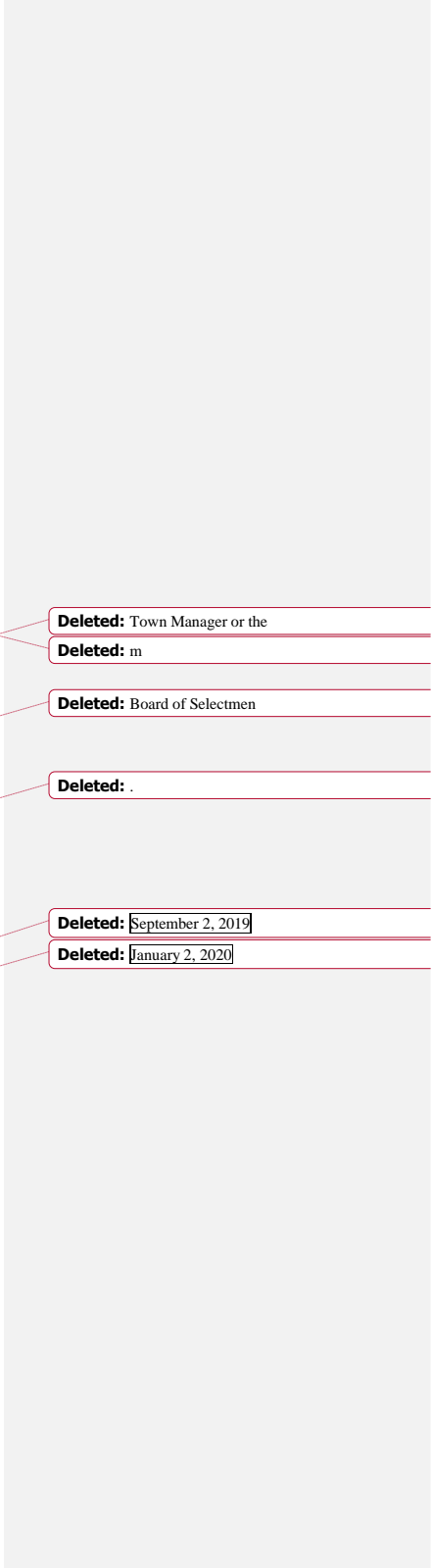
At the conclusion of the interviews, a composite rating will be assigned to each Proposal. After review of the composite ranking of the Technical Proposal and interviews, the Price Proposals will be opened and evaluated by the interim Town Manager for the Town of Sudbury.

**CONTRACT AWARD**

The contract will be awarded to that Proposer deemed by the Select Board and/or its designees to have submitted the most advantageous proposal taking into consideration all of the Technical Proposal criteria and Proposers' interviews in addition to the Price Proposals. In accordance with the provisions of G.L. c. 30B, sections 5 and 9, the Town of Sudbury reserves the right to waive any informalities in any or all proposals, or to reject any or all proposals, if it be in the public's best interest to do so.

**TERM OF THE CONTRACT**

It is anticipated that work under this contract shall begin approximately and shall be completed on or before when it is anticipated the new Town Manager will begin employment with the Town of Sudbury. If the selected candidate begins work in Sudbury, and for any reason leaves the position within the first 12 months of employment, the consultant will conduct another search under the terms of this contract for an amount equal to out-of-pocket expenses only.



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Deleted: September 2, 2019

Deleted: January 2, 2020

Attachment5.b: Town Manager Exec Search Firm RFP 6-16-22 redlined from Lee (5330 : Vote on Town Manager Search Firm RFP/RFQ)

ATTACHMENT A

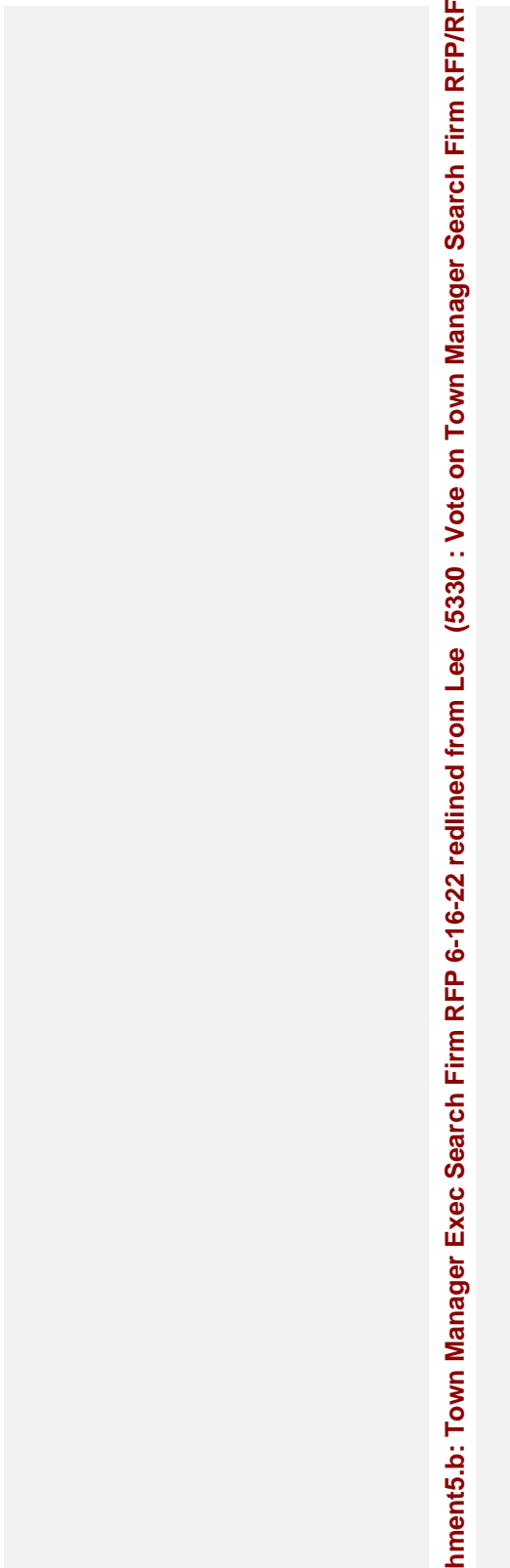
(To be submitted with the TECHNICAL PROPOSAL)

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid or proposal 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, or other organization, entity, or group or individuals.

\_\_\_\_\_  
Name of person signing bid or proposal

\_\_\_\_\_  
Name of Business Entity (if any)



Attachment 5.b: Town Manager Exec Search Firm RFP 6-16-22 redlined from Lee (5330 : Vote on Town Manager Search Firm RFP/RFQ)

ATTACHMENT B  
(To be submitted with the TECHNICAL PROPOSAL)

CERTIFICATE OF TAX COMPLIANCE

Pursuant to MGL c. 62C, § 49A, the undersigned acting on behalf of the Contractor, certifies under the penalties of perjury that, to the best of the undersigned's knowledge and belief, the Contractor is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
\*\*Signature of Individual

\_\_\_\_\_  
\*\*\* Contractor's Social Security Number (Voluntary) or Corporate Contractor (Mandatory) or Federal Identification Number

By: Date: \_\_\_\_\_

Corporate Officer (Mandatory, if applicable)

- \*\* The provision in the Attestation relating to child support applies only when the Contractor is an individual.
- \*\* Approval of a contract or other agreement will not be granted unless the applicant signs this certification clause.
- \*\*\* Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of MGL c. 62C, § 49A.

ATTACHMENT C

Price Proposal (To be submitted in a **separate sealed envelope** from the Technical Proposal)

The price proposal (one original copy) must be submitted without “conditions or exceptions” and must be submitted under separate cover and in a sealed envelope.

The price proposal set forth in this proposal shall constitute full and complete compensation for the services to be provided by the Consultant’s Firm. There shall be no reimbursement for out-of-pocket or other expenses incurred by the Consultant in connection with the performance of the services without the approval of the Interim Town Manager. Any exceptions may result in the rejection of the proposal.

Price Proposal for The Town of Sudbury Town Manager search:

\$ \_\_\_\_\_ Total Fixed Fee Contract Price

Total Fixed Fee Contract Price in words: \_\_\_\_\_

Signature: \_\_\_\_\_

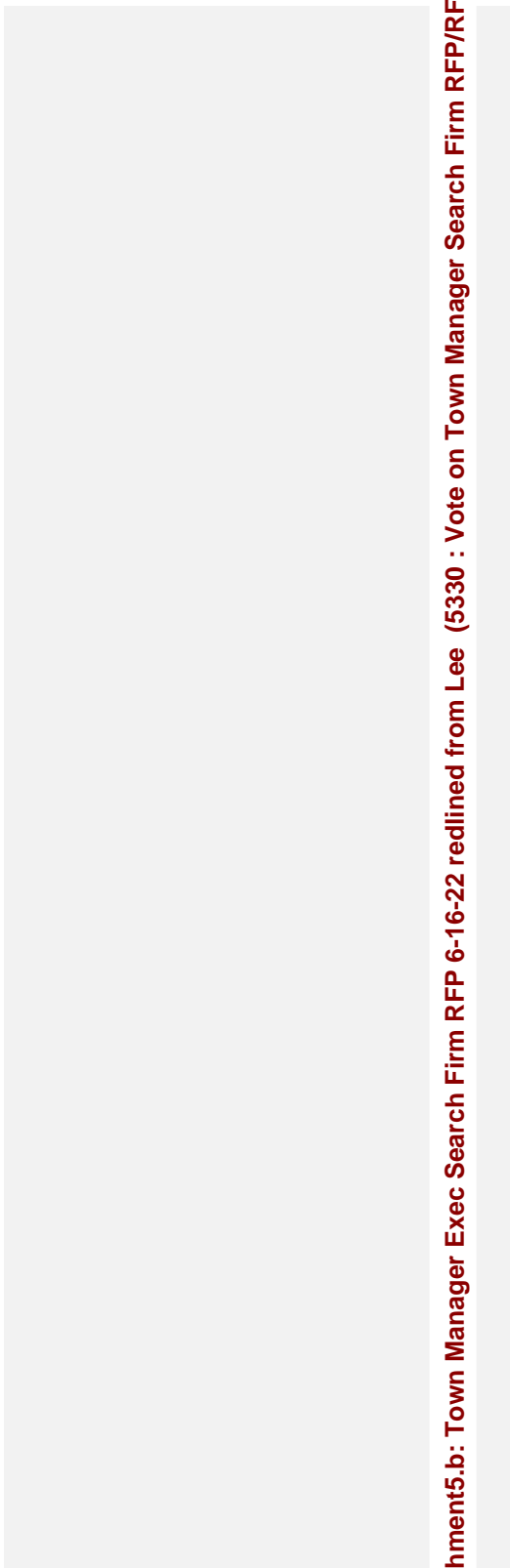
Title: \_\_\_\_\_

Company: \_\_\_\_\_ Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

Email \_\_\_\_\_

Date: \_\_\_\_\_



Attachment5.b: Town Manager Exec Search Firm RFP 6-16-22 redlined from Lee (5330 : Vote on Town Manager Search Firm RFP/RFQ)

ATTACHMENT D  
Technical Proposal Rating Sheet

Each element of the Technical Proposal must be rated using the following scale:  
Highly Advantageous: 3 Advantageous: 2 Not Advantageous: 1 Unacceptable: 0

Name of Proposer \_\_\_\_\_

**TOWN OF SUDBURY  
Select Board  
278 Old Sudbury Road  
Sudbury MA 01776**

**REQUEST FOR PROPOSALS**

**SEARCH FIRM TO ASSIST WITH TOWN MANAGER RECRUITMENT**

**OVERVIEW**

The Town of Sudbury is seeking to recruit a Town Manager, the fifth in the Town's history. The Town adopted the position of Town Manager when the Board of Selectmen-Town Manager Special Act was enacted in 1994. The Town Manager reports to a 5-person Select Board and is assisted in their work by an Assistant Town Manager and a dedicated team of Senior Managers, department heads and employees. The Town is also fortunate to be served by both elected and appointed volunteer Boards, Commissions and Committees who take an active role in the governance of the Town. Sudbury, a community of more than 18,000 residents, has an open Town Meeting form of government.

Following is the Scope of Services for the Town of Sudbury for consultant or executive recruitment services for the recruitment of a Town Manager. It is important that the process includes public participation and input from a wide variety of stakeholders. The appointee to the Town Manager position will serve in accordance with the Special Act. The link to the Special Act is posted on the Town's website at [https://cdn.sudbury.ma.us/wp-content/uploads/sites/342/2014/08/TownManagerAct\\_1993.pdf?version=1c8dad11ab91f8f992510496a57368ee](https://cdn.sudbury.ma.us/wp-content/uploads/sites/342/2014/08/TownManagerAct_1993.pdf?version=1c8dad11ab91f8f992510496a57368ee)

**SCHEDULE AND TIME LINE**

The Request for Proposals (RFP) will be available in the Sudbury Select Board's Office, Sudbury Town Building, 278 Old Sudbury Road, Sudbury MA 01776, after 9:00 AM on [REDACTED]  
[REDACTED] The RFP is available via email by contacting Patty Golden in the Select Board's office at:

[goldenp@sudbury.ma.us](mailto:goldenp@sudbury.ma.us).

Inquiries involving procedural or technical matters related to the Request for Proposals shall be submitted in writing and received no later than three (3) business days prior to the time the proposals are due as stated in the advertisement, and must be directed:

Via US Mail:  
Patty Golden  
Senior Administrative Assistant to the Town Manager  
Select Board's Office  
278 Old Sudbury Road  
Sudbury, MA 01776

or Via Fax:  
978-443-0756

or Via Email:  
goldenp@sudbury.ma.us

Proposals will be received until 10:00 a.m. (Boston time) on \_\_\_\_\_.  
**E-MAILED AND FAXED PROPOSALS WILL NOT BE ACCEPTED.** It is the proposer's sole responsibility to submit the proposal before the deadline, and the Town is not responsible for delays in deliveries, deliveries attempted when Town offices are closed, mistakes in deliveries, or any other reason for a proposal that is not submitted prior to the deadline

Interviews of qualified proposers, if any will be held during the months of August or September. The award of this contract, if any, will be no later than sixty (60) days after the deadline for the submission of proposals. In accordance with the provisions of M.G.L. c. 30B, § 5 and 9, the Town of Sudbury reserves the right to waive any informality in any or all proposals, or to reject any or all proposals, if it is in the public's best interest to do so.

### **SCOPE OF WORK**

The Town of Sudbury seeks proposals from executive search consultants experienced in recruiting municipal executives in Massachusetts to assist the Town in recruiting highly qualified candidates for Sudbury's next Town Manager.

The Consultant shall work with the Select Board, Senior Staff of the Town, and an appointed Screening Committee to actively source, recruit, evaluate suitability of, interview and refer qualified candidates to the Town of Sudbury for the position of Town Manager.

The scope of work will include, but not be limited to, a process which includes the following:

- Consultant shall assist the Select Board, Senior Staff, and designated Screening Committee in soliciting community input and feedback regarding the traits and management style desired in a new Town Manager. This item shall include assistance in developing the process for soliciting opinions, creating vehicles for eliciting stakeholder feedback and compiling results and publishing conclusions. Consultant will present a written report to the Select Board with findings and recommendations from stakeholder interviews and other information gathering efforts.
- Consultant shall assist the Select Board in establishing selection criteria for evaluating Town Manager candidates.
- Consultant shall work with the Select Board and Interim Town Manager to develop descriptive documents for prospective candidates. The descriptive documents shall include background statements and expectations regarding the Town Manager position for prospective candidates as well as marketing information regarding the Town for distribution to prospective candidates.



- Consultant shall conduct networking and other search activities to generate a diverse pool of highly qualified prospective candidates who meet the Select Board's selection criteria. These activities shall include, at a minimum, publishing the vacancy using regional and national means. Consultant shall focus on identifying potential candidates, screening them for suitability with the Town of Sudbury, motivating them to interview for the position of Town Manager.
- Consultant shall work with the Select Board, and Screening Committee to review resumes of qualified applicants, schedule interviews with the Screening Committee and, then, with finalists, with the Select Board. Consultant shall provide training and guidance to the Screening Committee and Select Board in areas of human resources best practices and legal requirements and instructions applicable through the process.
- Consultant shall check references on finalists, extend the offer of employment, review benefits, and generally assist in the hiring process in ways and at the times requested by the Select Board or the Town's Human Resources department.
- Consultant shall provide sufficient notification to all candidates who applied but were not selected for initial interviews and, also for those interviewed but not offered the position.
- Consultant shall act at all times in an attentive, ethical, and responsible manner so as to represent the Town of Sudbury with the utmost concern for its interests, goals and image with candidates, other communities, and members of the general public.

The Select Board reserves the right to not hire any of the candidates provided by the consultant.

The Select Board reserves the right to hire a candidate not recommended or provided by the consultant.

### **PROPOSAL SUBMISSION REQUIREMENTS**

Failure to submit documents requested may result in the Town's determination that a proposal is non-responsive unless the Town deems such a failure to be a minor informality.

There are two components to the Proposal:

- A) Technical Proposal, including information about the proposer, references, and the services to be provided; and
- B) Price Proposal, including a fixed price fee for services to be rendered under the terms of the contract.

#### **A) TECHNICAL PROPOSAL**

The following documentation must be contained in the Technical Proposal to prove responsiveness to each required element. Technical Proposals received without the required documentation for each required element may be deemed unresponsive. Technical Proposals must be arranged in the order specified below, with responses and documentation separated by tabs or index dividers. Each page of the Technical Proposal must contain a footer with the page number.

### Required Elements of the Technical Proposal:

- Table of Contents, showing where required information can be found by section and page.
- Letter of Interest, including the firm's history and the name of the principal or “lead consultant” who will be assigned to work directly with the Town on this search. Proposers are directed to note that the contract will require that the same principal or “lead consultant” be assigned to this contract for the duration of the search process, through and including the hiring of a Town Manager for the Town of Sudbury.
- An Organizational Chart, if the Proposer is a firm or corporation, indicating the name and position of all consultants who will work with the Town on this search. If the Proposer is not a firm or corporation, the Proposer should so state in this section.
- Current Resume(s), including summaries of credentials and number of years of experience providing executive municipal search services for the lead consultant assigned to Sudbury and any additional consultants who will be assigned to work with the Town on this search.
- Description of the Proposer's Approach and Plan for performing services outlined in the Scope of Work (see above), including:
  - Description of how the Proposer will specifically identify and target the needs of the Town in the search for a new Town Manager;
  - Description of the consultant's approach to ensuring community involvement and input;
  - Description of proposed candidate recruitment strategies;
  - Description of the consultant's proposed implementation plan;
  - Proposed timeline with specific milestones;
  - List of Recent Contracts, including name, address and telephone number, of all communities for which the firm has provided similar Town Manager or Town Administrator search services during the past five (5) years and specific persons to contact;
  - References, for a minimum of three (3) comparable executive search projects completed in the past five (5) years;
  - Promotional Material, including advertisements, brochures and other recruitment materials used in Town Manager/Town Administrator searches or promotional literature about the firm;
  - Signed Certificate of Non-Collusion (Included as Attachment A to this RFP);
  - Signed Certificate of Payment of Taxes (Included as Attachment B to this RFP)

### B) PRICE PROPOSAL

- The Price Proposal form, included as Attachment C, must be completed and included as the proposer's Price. Proposer's price shall include the cost of any advertisements, solicitations, or other collateral materials associated with the recruitment effort and any other out of pocket costs associated with the project.
- The Price Proposal (one original copy) must be submitted without conditions or exceptions and must be submitted **under separate cover and in a sealed envelope**.

- Price Proposals shall remain in effect for a period of 60 (sixty) calendar days from the date of proposal submittal or until it is formally withdrawn, a contract is executed, or this Request for Proposal is canceled, whichever occurs first.
- Price Proposals submitted without the required form or including other conditions of pricing may be deemed unresponsive.

### **PROPOSAL SUBMITTAL**

Technical and Price Proposals must be submitted in separate sealed envelopes and plainly marked as follows: “TECHNICAL PROPOSAL-Sudbury Town Manager Search”, and “PRICE PROPOSAL-Sudbury Town Manager Search” along with the name of the consultant, consulting firm or executive recruiter clearly marked on both envelopes.

IF PRICES ARE INCLUDED WITHIN THE TECHNICAL PROPOSAL, THE PROPOSAL WILL BE DISQUALIFIED.

- Technical Proposals should be sealed in a separate envelope with one (1) original, nine (9) hard copies, and one (1) CD or thumb drive.
- Price Proposals should be submitted in a sealed envelope of one (1) signed original.

- Both sealed proposals must be submitted together in one envelope or mailer and received in the Select Board’s office no later than 10:00 a.m. (Boston time), Monday,  
to:

Patty Golden  
Senior Administrative Assistant to the Town Manager  
Select Board’s Office  
278 Old Sudbury Road  
Sudbury, MA 01776

E-MAILED AND FAXED PROPOSALS WILL NOT BE ACCEPTED. ANY PROPOSALS DELIVERED AFTER THE SUBMITTAL DEADLINE WILL NOT BE CONSIDERED AND WILL BE RETURNED UNOPENED.

It is the proposer’s sole responsibility to submit the proposal before the deadline, and the Town is not responsible for delays in deliveries, deliveries attempted when Town offices are closed, mistakes in deliveries, or any other reason for a proposal that is not submitted prior to the deadline. The names and addresses of all parties submitting proposals will be recorded and the proposals will then be provided to the Select Board and/or their designees selected to evaluate the proposals.

### **EXAMINATION OF DOCUMENTS**

Each Proposer shall be satisfied as to the requirements of the contemplated services to enable the intelligent preparation of this proposal. The Proposer shall be familiar with all submittal and RFP requirements before submitting the proposals in order that no misunderstanding shall exist in regard to the nature and character of the contemplated services to be performed. No allowance

will be made for any claim that the proposal is based on incomplete information as to the nature and character of the area or contemplated service.

### **EVALUATION OF PROPOSALS**

Technical Proposals will be opened and evaluated by the Select Board and/or its designees who will individually rate the proposals. Evaluation of Technical Proposals will be based on weighted, comparative criteria described in this section. The following scale will be used to evaluate each criterion, as well as to determine a composite rating for each proposal:

- Highly Advantageous (3 points)
- Advantageous (2 points)
- Not Advantageous (1 point)
- Unacceptable (0 points)

#### **Proposer's Networking Strategies**

**Highly Advantageous:** The Proposal provides more than three (3) examples of how the Proposer's established networks of professional municipal contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

**Advantageous:** The Proposal provides three (3) examples of how the Proposer's established networks of professional municipal contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

**Not Advantageous:** The Proposal provides fewer than three (3) examples of how the Proposer's established networks of professional municipal contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

**Unacceptable:** The Proposal does not include specific examples of networks the Proposer will use in the search and recruitment process.

#### **Proposer's Experience/Key Personnel**

**Highly Advantageous:** The Proposer has five (5) or more years' experience in conducting successful executive searches with municipalities and other government or non-profit organizations, and during that period has concluded at least three (3) successful searches for a Town Manager/Town Administrator in Massachusetts, one of which must have been for a municipality of similar size and demographics to Sudbury. The Proposer's lead consultant has more than five (5) years' experience conducting Town Manager/Town Administrator searches in Massachusetts.

**Advantageous:** The Proposer has at least three (3) years' experience in conducting successful executive searches with municipalities, government and other non-profit organizations, and during that period has concluded at least two (2) successful executive searches for a Town Manager/Town Administrator in Massachusetts. The Proposer's

lead consultant has at least three (3) years' experience conducting Town Manager/Town Administrator searches in Massachusetts.

**Not Advantageous:** The Proposer has fewer than three (3) years' experience in successful executive searches with municipalities, government and other non-profit organizations, and during that period has concluded only one successful executive searches for a Town Manager/Town Administrator in Massachusetts. The Proposer's lead consultant has fewer than three (3) years' experience conducting Town Manager/Town Administrator searches in Massachusetts.

**Unacceptable:** The Proposer has fewer than three (3) years' experience in executive search and hiring processes and has not concluded any successful executive searches for a Town Manager/Town Administrator. The Proposer's lead consultant has no experience conducting a Town Manager/Town Administrator search in Massachusetts.

#### Proposer's Approach to Ensuring Community Involvement

**Highly Advantageous:** The Proposal provides more than three (3) project examples where the proposed Lead Consultant for Sudbury Town Manager/Town Administrator search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a Town Manager/Town Administrator.

**Advantageous:** The Proposal provides three (3) project examples where the proposer Lead Consultant for Sudbury Town Manager/Town Administrator search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a Town Manager/Town Administrator.

**Not Advantageous:** The Proposal provides fewer than three (3) project examples where the proposer Lead Consultant for Sudbury Town Manager search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a Town Manager.

**Unacceptable:** The Proposal provides fewer than three (3) project examples where the proposed Lead Consultant has organized, trained and facilitated working groups as part of an executive search process, none of which has led to the hiring of a Town Manager.

#### Proposer's Implementation Plan and Schedule

**Highly Advantageous:** The Proposal includes a detailed description and examples of previously successful recruitment strategies and includes a clearly delineated timeline with specific milestones for Sudbury's Town Manager search.

**Advantageous:** The Proposal includes an outline of some candidate recruitment strategies and an implementation plan that includes some milestones for Sudbury's Town Manager search.

**Not Advantageous:** The Proposal lacks specific candidate recruitment strategies or specific milestones for Sudbury's Town Manager search.

**Unacceptable:** The Proposal does not include any information about a proposed implementation plan and schedule.

#### Proposer's References

**Highly Advantageous:** All five (5) references were satisfied with the Proposer's work and stated that all executive search tasks were completed within the time frame required.

**Advantageous:** All five (5) references were satisfied with the Proposer's work and stated that all executive search tasks were completed but not within the time frame(s) required.

**Not Advantageous:** Fewer than five (5) references were satisfied with the end results.

**Unacceptable:** The preponderance of references were dissatisfied with the end results.

#### Proposer's Recruitment Materials

**Highly Advantageous:** The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least five (5) different Town Manager searches with the proposal, at least one (1) of which involves a Town Manager search in Massachusetts.

**Advantageous:** The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least three (3) different executive searches with the proposal, at least one (1) of which involves a Town Manager/Town Administrator search in Massachusetts..

**Not Advantageous:** The Proposer includes three (3) or fewer samples of advertisements, brochures, and other forms of candidate outreach with the proposal, none of which involve a Town Manager/Town Administrator search.

**Unacceptable:** The Proposer does not include samples of advertisements, brochures or other forms of candidate outreach.

All Technical Proposals will be given a cumulative ranking based on individual rankings of the following weighted elements, using a scoring sheet included as Attachment D: Proposer's Networking Strategies, Proposer's Experience/Key Personnel, Proposer's Approach to Ensuring Community Involvement, Proposer's Implementation Plan and Schedule, Proposer's Recruitment Materials, and Proposer's References.

The Town of Sudbury Select Board and/or their designees may invite all Proposers to be interviewed who submitted the most advantageous Technical Proposals, taking into consideration all of the Technical Proposal criteria, and have most advantageous overall evaluation ratings. Interviews will be ranked as follows:

**Highly Advantageous:** The Lead Consultant for this project was present, clearly stated a plan of action, demonstrated excellent communications skills, presented other personnel with experience and skills who will be assigned for the duration of this project, and successfully responded to all questions.

**Advantageous:** The Lead Consultant for this project was present, outlined a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project, and successfully responded to most of the questions.

**Not Advantageous:** The Lead Consultant for this project was present but did not present a clear plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on this project and/or who would not be assigned for the duration of this project, or did not successfully respond to questions.

**Unacceptable:** The Lead Consultant for this project was not present at the interview or was unable to communicate effectively and did not successfully respond to questions.

At the conclusion of the interviews, a composite rating will be assigned to each Proposal. After review of the composite ranking of the Technical Proposal and interviews, the Price Proposals will be opened and evaluated by the interim Town Manager for the Town of Sudbury.

### **CONTRACT AWARD**

The contract will be awarded to that Proposer deemed by the Select Board and/or its designees to have submitted the most advantageous proposal taking into consideration all of the Technical Proposal criteria and Proposers' interviews in addition to the Price Proposals. In accordance with the provisions of G.L. c. 30B, sections 5 and 9, the Town of Sudbury reserves the right to waive any informalities in any or all proposals, or to reject any or all proposals, if it be in the public's best interest to do so.

### **TERM OF THE CONTRACT**

It is anticipated that work under this contract shall begin approximately and shall be completed on or before when it is anticipated the new Town Manager will begin employment with the Town of Sudbury. If the selected candidate begins work in Sudbury, and for any reason leaves the position within the first 12 months of employment, the consultant will conduct another search under the terms of this contract for an amount equal to out-of-pocket expenses only.

ATTACHMENT A  
(To be submitted with the TECHNICAL PROPOSAL)

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal 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, or other organization, entity, or group or individuals.

\_\_\_\_\_  
Name of person signing bid or proposal

\_\_\_\_\_  
Name of Business Entity (if any)



ATTACHMENT B  
(To be submitted with the TECHNICAL PROPOSAL)

CERTIFICATE OF TAX COMPLIANCE

Pursuant to MGL c. 62C, § 49A, the undersigned acting on behalf of the Contractor, certifies under the penalties of perjury that, to the best of the undersigned's knowledge and belief, the Contractor is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
\*\*Signature of Individual

\_\_\_\_\_  
\*\*\* Contractor's Social Security Number (Voluntary) or Corporate Contractor (Mandatory) or Federal Identification Number

By: Date: \_\_\_\_\_

Corporate Officer (Mandatory, if applicable)

\*\* The provision in the Attestation relating to child support applies only when the Contractor is an individual.

\*\* Approval of a contract or other agreement will not be granted unless the applicant signs this certification clause.

\*\*\* Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of MGL c. 62C, § 49A.

ATTACHMENT C

Price Proposal (To be submitted in a **separate sealed envelope** from the Technical Proposal)

The price proposal (one original copy) must be submitted without “conditions or exceptions” and must be submitted under separate cover and in a sealed envelope.

The price proposal set forth in this proposal shall constitute full and complete compensation for the services to be provided by the Consultant’s Firm. There shall be no reimbursement for out-of-pocket or other expenses incurred by the Consultant in connection with the performance of the services without the approval of the Interim Town Manager. Any exceptions may result in the rejection of the proposal.

Price Proposal for The Town of Sudbury Town Manager search:

\$ \_\_\_\_\_ Total Fixed Fee Contract Price

Total Fixed Fee Contract Price in words: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_ Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

Email \_\_\_\_\_

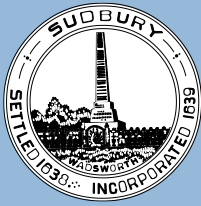
Date: \_\_\_\_\_

Attachment5.c: Town Manager Exec Search Firm RFP 6-16-22 Final non-redlined Draft from Lee (5330 : Vote on Town Manager Search Firm

ATTACHMENT D  
Technical Proposal Rating Sheet

Each element of the Technical Proposal must be rated using the following scale:  
Highly Advantageous: 3 Advantageous: 2 Not Advantageous: 1 Unacceptable: 0

Name of Proposer \_\_\_\_\_



SUDBURY SELECT BOARD  
Tuesday, June 21, 2022

**MISCELLANEOUS (UNTIMED)**

**6: Citizen's Comments (cont)**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Citizen's Comments (cont)

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

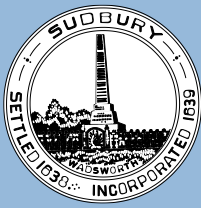
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

06/21/2022 7:00 PM



SUDBURY SELECT BOARD  
Tuesday, June 21, 2022

**MISCELLANEOUS (UNTIMED)**

**7: Upcoming agenda items**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Upcoming agenda items

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

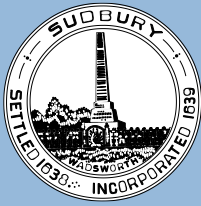
06/21/2022 7:00 PM

## POTENTIAL UPCOMING AGENDA ITEMS/MEETINGS

MEETING/EVENT	DESCRIPTION
<b>June 28</b>	2022 Select Board Newsletter topic discussion
	DEI commission conversation and training update
	Vocational technical schools update
	Project update from Town Manager Hayes
	LS student proposal
	ARPA reconciliation
	Remote/hybrid meetings discussion
	Discussion on Town Manager Search Firm RFP
<b>July 12</b>	Public Hearing to present CWMP update by DPW Director Dan Nason and Rosemary Blacquier of Woodard and Curran
	Public Hearing discuss possible fall Town Meeting
<b>July 14, 7:00-9:00 PM</b>	Town Forum (via Zoom): Climate Change and Sustainability in Sudbury
<b>Date to be determined</b>	By-law items to examine - Special Events & Demonstration Permits; Common Victualler License Holders (Related to Farm Act exemptions, citizen request); Nuisance/Blight Bylaw; Removal Authority of members from appointments
	Sudbury Housing Trust Bylaw
	Capital Process
	Citizen Leadership Forum
	Climate Emergency declaration & sustainability director
	Comprehensive Wastewater Management Plan (CWMP) update – public hearing
	Discussion on Select Board meeting flow, process, efficiency, and decorum
	Discussion on potential ADA policy
	Discussion on Town Manager Task Requests
	Discussion on whether to extend DEI commission (by 9/30/22)
	Executive Session minutes to review/release
	Eversource
	Fairbank Community Center update (ongoing)
	Health/COVID-19 update
	Investment Advisory Committee
	Invite Commission on Disability Chair to discuss Minuteman High School
	Local receipts – fee schedule review (Member Russo)
	Quarterly review of approved Executive Session Minutes for possible release (February, May, August and November). Consider separate meeting solely for this purpose.
	Quarterly update from Diversity, Equity and Inclusion Commission (DEI) (December, March, June, September)
	Quarterly update on Bruce Freeman Rail Trail (BFRT) (March, June, September, December)
	Quarterly update on Key Performance Indicators (KPIs) projects to track (December, March, June, September)
	Peakham Road Speed Limits
	Route 20 empty corner lot – former gas station
	Select Board Retreat (Member Dretler)
	Sidewalks discussion
	Solar Panels
	Subcommittee discussion (Executive)

Attachment 7.a: Upcoming items 06.21.22 (5322 : Upcoming agenda items)

	Town Manager Goals and Evaluation process
	Town Manager Review and Timeline
	Town meeting recap – year in review
	Town Meeting Article 29 actions
	Town-wide traffic assessment and improve traffic flow
	Update on crosswalks (Chief Nix/Dan Nason)
	Update on traffic policy (Chief Nix)
	Vocational Education discussion (Lisa K request)
	Work Session with Town Counsel: Select Board/Town Manager Code of Conduct and other procedural training
<b>Standing Items for All Meetings</b>	Select Board requests for future agenda items at end of meeting
	Citizens Comments, continued (if necessary)



SUDBURY SELECT BOARD  
Tuesday, June 21, 2022

**CONSENT CALENDAR ITEM**

**8: Bullfinch's Sunday Entertainment License - One Day**

REQUESTOR SECTION

Date of request:

Requested by: Leila S. Frank

Formal Title: Vote to approve a Sunday Entertainment License for Bullfinch's, Inc., d/b/a Bullfinch's Restaurant, 730 Boston Post Road, for a live music duo (flute and accordion) from 5:00 p.m. to 8:00 p.m. on Sunday, June 26.

Recommendations/Suggested Motion/Vote: Vote to approve a Sunday Entertainment License for Bullfinch's, Inc., d/b/a Bullfinch's Restaurant, 730 Boston Post Road, for a live music duo (flute and accordion) from 5:00 p.m. to 8:00 p.m. on Sunday, June 26.

Background Information:  
attached

Financial impact expected:\$250 license fee

Approximate agenda time requested:

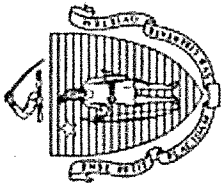
Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Town Counsel	Pending
Select Board	Pending

06/21/2022 7:00 PM





THE COMMONWEALTH OF MASSACHUSETTS

Town OF Sudbury

LICENSE

For PUBLIC ENTERTAINMENT ON SUNDAY

State Fee, \$ 2  
Municipal Fee, \$ 20

The Name of the Establishment is Bullfinchs in or on the property at No. 130 Boston Post Road #1 Sudbury MA 01776 (address)

The Licensee or Authorized representative, Thomas Scott Richardson in accordance with chapter 136 of the General Laws, as amended, hereby request a license for the following program or entertainment:

DATE	TIME	Proposed dancing or game, sport, fair, exposition, play, entertainment or public diversion
6.16.22	5pm-8pm	Accordion & Flautist Non-amplified

Hon. Board Mayor/ Chairman of Board of Selectmen, Sudbury (City or Town)

Fees per occurrence (Individual Sunday(s)): Regular Hours (Sunday 1:00pm - Midnight): \$2.00 Special Hours (Sunday 12:00 am- Midnight): \$5.00. Annual Fee (For Operating on every Sunday in calendar year): Regular Hours (Sunday 1:00pm - Midnight): \$50.00 Special Hours (Sunday 12:00 am- Midnight): \$100.00

This license is granted and accepted, and the entertainment approved, upon the understanding that such entertainment that the licensee shall comply with the laws of the Commonwealth applicable to licensed entertainments, and also to the following terms and conditions: The licensee shall at all times allow any person designated in writing by the Mayor, Board of Selectmen, or Commissioner of Public Safety, to enter and inspect his place of amusement and view the exhibitions and performances therein; shall permit regular police officers, detailed by the Commissioner of Public Safety or Chief of the local Police Department to enter and be about this place of amusement during performances therein; may employ to preserve order in his place of amusement only regular or special police officers designated therefore by the Chief of Police, and shall pay to said Chief of Police for the services of the regular police officers such amount as shall be fixed by him; shall permit at all times to enter and be about his place of amusement such members of the Fire Department as shall be detailed by the Chief of the Fire Department to guard against fire; shall keep in good condition, go as to be easily accessible, such standpipes, hose, axes, chemical extinguishers and other apparatus as the fire department may require; shall allow such members of the fire department in case of any fire in such place, to exercise exclusive control and direction of his employees and of the means and apparatus provided for extinguishing fire therein; shall permit no obstruction of any nature in any aisle, passageway or stairway of the licensed premises, nor allow any person therein to remain in any aisle passageway or stairway during an entertainment; and shall conform to any other rules and regulations at any time made by the Mayor or Board of Selectmen. This license shall be kept on the premise where the entertainment is to be held, and shall be surrendered to any regular police officer or authorized representative of the Department of Public Safety. This license is issued under the provisions of Chapter 136 of the General Laws, as amended, and is subject to revocation at any time by the Mayor, Board of Selectmen, or Commissioner of Public Safety.

Do not write in this box

This application and program must be signed by the licensee or authorized representative of entertainment to be held. No Change to be made in the program without permission of the authorities granting and approving the license.

THIS LICENSE MUST BE POSTED IN A CONSPICUOUS PLACE ON THE PREMISES

(Revised 2015)

FORM 90

Attachment 8.a: Bullfinchs Sunday Ent 6.26.22 (5331 : Bullfinch's Sunday Entertainment License - One Day)

## **Bullfinchs: One-Day Sunday Entertainment License**

*June 26, 2022*

### **Department Feedback**

#### **Police Department**

As we have done in the past, we will assess any noise complaints that may be made on individual basis. Given the instruments specified, I think they should be ok, hence have no issues with approval.

-Chief Scott Nix

#### **Fire Department**

FD is ok with this as long as the instruments and entertainment do not block any means of egress.

-Asst Fire Chief Tim Choate

#### **Building Department**

They need to adhere to occupancy limits. Otherwise, no issues.

-Building Inspector Andrew Lewis