

Request for Proposals Consultant and Trainer:

Organizational Diversity, Equity and Inclusion Transformation

Application Deadline: Friday, September 25, 2020 by 5 p.m.

CASA of Santa Cruz (referred to as CASA throughout) invites proposals from qualified applicants interested in entering into a contract to perform consulting and training services related to organizational equity, diversity and inclusion transformation. We are seeking services that will help members of our staff and board build skills and competencies as CASA strives to further operationalize diversity, equity and inclusion.

Background

CASA recruits, screens, trains and supervises volunteer Advocates who work with the families of babies and toddlers and with child and youth in the dependency care system (previously known as the foster care system), advocating for their best interests in court, at home, in school, and in the community.

Court Appointed Special Advocates (referred to as "Advocates" throughout) provide children, youth, and families with support through their difficult journey, with an emphasis on ensuring that their voice is heard in court. Children and youth also get to know their Advocate as a person they can rely on: someone they trust to have their best interests at heart. The support and encouragement of an Advocate has been shown to make a positive and powerful difference for children and youth during their time in the system and beyond.

CASA of Santa Cruz County is supported by individual donations and by grants. CASA of Santa Cruz County belongs to a network of over 950 CASA organizations at the state and national levels. As an affiliate of National CASA, we have a mandate to:

1. Work to diversify our staff, volunteers and governing body to reflect the population and meet the needs of the children served
2. Promote equity and inclusion through our governance, management, operations, recruitment, continuing education, retention and advocacy policies and practices.
3. Commit to understanding and working with local child welfare providers and the court to address disproportionality and disparate outcomes.
4. Promote a diverse, equitable and inclusive workplace.

While our programming has grown increasingly diverse through intentional efforts, we recognize that facets of the CASA organization are not representative of our county and that change entails significant responsibilities and challenges. CASA is committed to enabling a culture of participation that embodies best practices around diversity, equity and inclusion to best promote the richness and complexity of our community while working to address underlying causes of disproportionality.

As a first step, we are looking for a consultant to facilitate an exploration of our own personal and institutional assumptions and biases and then co-develop a plan with staff and Board members to further operationalize diversity, equity and inclusion throughout all of our practices and advocacy.

This work necessitates the interrogation of our own personal and institutional assumptions and biases and engagement in purposeful dialogues both internally and externally.

Recently, we conducted a yearlong strategic planning exercise and diversity, equity and inclusion work is woven throughout the entire plan.

RFP Details

The purpose of this RFP is to solicit proposals from qualified applicants with experience in guiding organizations through successful equity, diversity and inclusion transformation. Qualified applicants should have a proven record that reflects their ability to obtain the following outcomes:

1. Build organizational commitment, consensus and infrastructure across functions of Board and staff to intentionally and demonstrably advance equity, diversity and inclusion-based transformation.
2. Development and implementation of an equity, diversity and inclusion action plan that builds upon elements of CASA's Strategic Plan; development of performance measurements related to integrating equity, diversity and inclusion.
3. Identify and use tools and training opportunities that develops a shared understanding of and commitment to diversity, equity and inclusion transformation across the organization.

CASA believes this work will engage all levels and areas of the organization, inclusive of our Board leadership and staff. However, we do not assume that the plan developed for staff and Board members will be the same. We also do not assume that the work outlined will be sequential; rather, we believe it will likely begin and end at different times and may be revisited as our organizational needs evolve over time. We also acknowledge that the COVID-19 pandemic might alter timelines and we will be flexible in our expectations during this unprecedented time. However, we are eager to start and believe that much of this work can be completed regardless of where our staff, board and audiences are located physically.

We also recognize that this work will be ongoing and will necessitate years of investment. As a first step we have identified deliverable to be undertaken before July 01, 2021.

Deliverables include:

1. Provide knowledge and insight on best inclusion practices in the field.
2. Undertake an analysis of existing organizational strengths and gaps with clear recommendations on how best to build upon strengths that will encourage anti-racism, equity, diversity and inclusion in all areas of our organization and community. Explicitly identify opportunities for improvement with suggestions regarding how to prioritize and operationalize those improvements.
3. In collaboration with staff and Board develop comprehensive plans and a unified long-term vision of equity, diversity and inclusion goals that align with CASA's strategic plan and National CASA guidelines and which are interwoven throughout all of CASA's programs and communications. The plan should include methods of both short- and long-term monitoring and evaluation that consider several areas, including but not limited to internal staffing practices, policies and procedures, community partnership

and engagement, advocacy to address disproportionality, two-way communication with all stakeholders and ongoing education for the board and staff.

3. Collect and document general progress made by the board and staff along the equity path and report on remaining organization-level capacity building needs to the staff leadership team and the Board Development committee for further work.

Budget and Timeline

The outlined scope of work shall not exceed \$10,000 in associated fees and shall include a timeline. All material costs, transportation, parking, taxes or other expenses should be included in outlined proposed budget submitted with the proposal. Any additional subcontracts related to trainings or outsourced fees must be included in this budget. No additional costs will be reimbursed unless previously included or agreed upon by both parties prior to incurring the expense.

Equipment and Systems

The contractor will be expected to use their own computer equipment and have their own workspace. Black and white printing of documents needed for the listed activities will be provided as necessary. Access to a conference call line will be provided as needed. Room(s) for group trainings will also be provided if and when it is appropriate for us to gather for meetings.

Qualifications and Proposal

The contractor, either an individual or a team from an organization, will have experience in organizational equity, diversity and inclusion transformation. The contractor will have an understanding of racial equity and be able to conduct this work through a racial equity lens.

Please send a complete proposal to Lynne Petrovic, Executive Director, at Lynne@casaofsantacruz.org, by 5 p.m. on September 25, 2020. Proposals should be submitted in PDF format and must include the following elements, in order.

1. CONTACT INFORMATION Provide the applicant's full name; organization (if appropriate); contact information, including business address, phone number, email; and website (if appropriate).

2. ORGANIZATIONAL DIVERSITY, EQUITY AND INCLUSION TRANSFORMATION EXPERIENCE

a. Provide brief narrative examples of the applicant's experience with other organizations seeking this training or organizations of similar size or with a focus in the human services sector.

b. Describe education strategies/timelines/ schedules/curriculum used with other organizations of similar size and scope.

c. Describe why the applicant wishes to work with CASA in this process or present any other history with the organization or sector pertinent to this submission.

3. SCOPE OF WORK Outline how the applicant intends to provide the services requested in this RFP. Describe the process for analyzing existing organizational strengths and gaps and the development of appropriate education curriculum and a timeline for implementation.

4. **COST** Provide a proposed budget for the scope of work, including an estimated number of hours. As part of the proposed budget, list each individual that may perform services and their title, the proposed hourly rate, and the level of involvement anticipated for each component.

5. **RÉSUMÉ** Append résumés of each individual who will provide services under the proposal, as well as well as a written description of the individual's experience and role in the work to be done.

6. **REFERENCES** Include names and contact information for three professional references, preferably clients who have utilized the applicant's services on matters related to organizational equity, diversity and inclusion transformation.

Evaluation

CASA shall evaluate each proposal that is properly submitted. After submission and review of proposals, interviews (phone or over virtual conference) will likely be requested beginning October 5, 2020.

Selection of a consultant to oversee CASA's organizational equity, diversity and inclusion transformation will be based on the following criteria:

1. Experience and qualifications of the applicant in performing equity, diversity and inclusion consultation and training for organizations of similar size.
2. Familiarity with Santa Cruz County communities.
4. A demonstrated knowledge of our mission, vision and Strategic Plan.
5. Clarity, thoroughness and responsiveness to RFP requirements.
6. Capacity and time to take on and complete work within the desired time frame (please see below).

While the order of these factors does not generally denote relative importance, CASA acknowledges that selecting an effective contractor primarily requires a balanced combination of reasonable rates as well as strong experience and demonstrated expertise in providing organizational equity, diversity and inclusion consultation and training.

Prior to submitting, if you would like to arrange a 30-minute call to discuss our goals for this partnership, and to learn more about our mission, vision or programs, we are happy to do so. You can contact Lynne Petrovic at Lynne@casaofsantacruz.org.

Summary of Key Dates RFP announcement:

September 25, 2020 Proposal deadline:

October 05 , 2020 Interviews held during this week:

October 16, 2020 Final confirmation of contractor:

October 26, 2020 – July 01, 2021 Work period:

