



United States
Ombudsman Association

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Request for Proposal

RFP Due Date: April 30, 2021

Request for Proposal (RFP): Organizational Diversity, Equity and Inclusion (DEI) Assessment and Development of Organizational DEI Strategic Plan

1. Introduction

The United States Ombudsman Association (USOA) was established in 1977 to foster the establishment and professional development of public sector ombudsman offices throughout the United States. The USOA is a membership organization comprised of approximately 130 members. The USOA has been organized to operate exclusively for educational, scientific, and charitable purposes. The purpose of the USOA is to assist existing Ombudsman organizations in improving the operation of Ombudsman offices throughout the United States. Additionally, the USOA dedicates itself to promote and encourage the establishment of new Ombudsman offices at the international, national, state, and local levels. In January 2021, the USOA created a subcommittee on DEI to establish and implement policies that create a supportive and inclusive culture for its members and to support members in their work with the diverse communities that USOA members serve.

The USOA employs the following definitions as it considers proposals for its DEI work:

Diversity: includes all the ways in which people differ, encompassing the different characteristics that make one individual or group different from another. While diversity is often used in reference to race, ethnicity, and gender, one can also embrace a broader definition of diversity that also includes age, national origin, religion, disability, sexual orientation, socioeconomic status, education, marital status, language, and physical appearance. The definition can also include diversity of thought: ideas, perspectives, and values. Individuals can affiliate with multiple identities.

Equity: is the fair treatment, access, opportunity, and advancement for all people, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. Improving equity involves increasing justice and fairness within the procedures and processes of institutions or systems, as well as in their distribution of resources. Tackling equity issues requires an understanding of the root causes of outcome disparities within our society.

Inclusion: is the act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate. An inclusive and welcoming climate embraces differences and offers respect in words and actions for all people. It's important to note that while an inclusive group is diverse, a diverse group isn't always inclusive. Increasingly, recognition of unconscious or "implicit bias" helps organizations to be deliberate about addressing issues of inclusivity.

2. Qualifications

The USOA is seeking proposals from consultants experienced in DEI organizational assessments and facilitation of a strategic planning process for staff, board members and chapter leadership. The ideal consultant/firm will have experience working with leaders with differing levels of knowledge and experience with these topics. We seek a partner who can provide knowledge and education on DEI, expert facilitation techniques, and the flexibility to make sure program goals are met.

3. RFP Purpose and Goals

The USOA seeks a baseline assessment of the USOA's current ability to support a diverse, equitable and inclusive environment for its members. This assessment should include a review of USOA policies, practices, instructional materials, promotional materials, and operating procedures.

Budget: The total amount available under this RFP is no more than \$10,000 for both components of the proposal with upward potential, as warranted based on proposals received. Each component should be priced separately. Submission of a proposal does not obligate the USOA to purchase goods or services. The organization reserves the right to select one or both proposals submitted by a vendor.

4. Scope of Services/Deliverables

Part One: Organizational Assessment

Assess DEI in the USOA's organizational operations and programs. The USOA seeks an assessment for measuring board, staff, and membership perceptions on how the USOA can best promote a DEI environment for its members. Our intention is to create an in-depth understanding of existing culture, strengths, and opportunities for improvement and to aid leadership members in creating a strategic action plan which will strengthen DEI within the organization and improve organizational performance. This work should include but is not limited to the following:

- Interviews of key leaders in the organization
- A survey of members
- A review of existing policies, practices, procedures, and organizational materials
- A final written report with recommendations that will inform the organization's strategic plan

Part Two: Strategic Plan

The selected consultant will work with designated USOA board members and DEI subcommittee member(s) to assist in the development of a strategic plan which reflects the needs and priorities identified in the DEI organizational assessment. The strategic planning process should include but is not limited to the following:

- A process which can accommodate a virtual platform for USOA board leadership (15-25 people) to participate
- Preparation/Distribution/Organization of all planning materials
- Creation of a draft plan
- Finalization of plan

5. Proposal requirements

- Name of lead firm and any sub-consultants
- Point of contact (name, title, phone number, mailing address, email address) at lead firm
- Description of relevant experience on projects of this type and a list of at 3 references within the past 5 years, with current contact information.
- Description of approach proposed for accomplishment of the work.
- A proposed schedule and work plan for the accomplishment of the work described above in the Scope of Services.
- A proposed budget.
- Any other pertinent information.

6. Evaluation of Proposals

The review of written proposals will be based on the following criteria, with the relevant weights in parentheses:

- Related experience and references of the firm or project team (40%)
- Approach (40%)
- Work plan and schedule (10%)
- Proposed budget (10%)

7. Project Timeline

Request for Proposals Due: April 30, 2021. Proposals shall be sent in PDF form and emailed to Gerald.papica@tn.gov

Notification to Applicants: May 31, 2021 upon final board approval

Questions: All questions should be submitted in writing to Gerald Papica at Gerald.papica@tn.gov by April 23, 2021.