



## Office of Mayor Miro Weinberger

### REQUEST FOR PROPOSALS (RFP)

**Date: September 20, 2013**

**To: Open Invitation to Strategic Planning Consultants**

**From: Office of Mayor Miro Weinberger, City of Burlington**

**Re: Strategic Planning Services for Diversity & Equity Plan Completion**

#### I. GENERAL INFORMATION & SCHEDULE

This Request for Proposals invites responses from qualified and experienced strategic planning consultants to work with the Ad Hoc Diversity & Equity Committee, appointed by the Mayor, and the Mayor's Equity Team to complete a Diversity & Equity Strategic Plan for the City of Burlington. Questions concerning this RFP must be made in writing and received via email or regular mail by the timeframe outlined below.

Issue date:	Friday, September 20, 2013 at 4:00 PM
Questions due:	Wednesday, October 2, 2013 by 12:00 PM
Proposals due:	Friday, October 11, 2013 by 12:00 PM
Anticipated finalist interviews:	October 17-18, 2013
Anticipated award date:	Week of October 21, 2013

Inquiries/submissions to:	Office of Mayor Miro Weinberger City of Burlington 149 Church Street Burlington, VT 05401 Attn: Jennifer Kaulius jennifer@burlingtonvt.gov 802.865.7272
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#### Requirements

Additional requirements are as follows:

- Proposers are solely responsible for ensuring that proposals arrive on time.
- All responses to this RFP shall be received in sealed envelopes, clearly marked "RFP: Burlington Diversity & Equity Strategic Plan."
- Late replies WILL NOT be considered.

## II. PROJECT DESCRIPTION

The purpose of the project is to complete the City's Diversity & Equity Strategic Plan and advise on its public dissemination and internal implementation through the Mayor's Office. The plan will provide recommendations and benchmarks to eliminate race-based disparities in City operations and services.

A committee comprised of City staff and citizen volunteers created a draft strategic plan and a "Diversity & Equity Goals Grid" between July 2012 and July 2013. The goals grid is attached for reference.

The City is seeking a consultant or team to finalize the document for adoption by the Administration and City Council at the January 27, 2014 City Council meeting. Using the working draft, the consultant will identify and analyze race-based disparities within City government and the broader Burlington community, research best-practices among peer cities for addressing comparable disparities, work with the City to identify and articulate initiatives for addressing the disparities, add benchmarks for these initiatives, collect and incorporate past City history and data, review phrasing, complete graphs and layout, and outline the assessment tool(s) to measure the City's progress in meeting benchmarks annually. Where appropriate, the final plan should include implementation recommendations for the plan's initiatives based on best-practices from other municipalities and organizations.

A detailed project scope description is listed below in Section III.

To meet these goals, the City seeks a consultant with the following attributes:

- Experience researching and writing strategic plans
- Experience working on racial diversity issues
- Familiarity with best practice models related to municipal employment, engagement of communities of color, and assessing and auditing progress in these areas
- Availability to accommodate the City's timeline
- Excellent facilitation skills
- Experience working with a wide range of stakeholder groups
- Experience navigating and making change in municipal systems
- Ability to present complex ideas and data in compelling graphic representation
- Ability to define achievable benchmarks and assist in mapping path to meeting them

The plan will be developed with support of the Ad Hoc Diversity & Equity Committee and Mayor's Equity Team, and will culminate with a presentation to the City Council and greater Burlington community early in 2014.

Existing supporting documents include:

- Diversity & Equity Resolutions (July 16, 2012)
- Draft Diversity & Equity Plan (Summer 2013)

Documents are available on the Committee's shared Google Drive folder:

<https://drive.google.com/?tab=co&authuser=0#folders/0Bz2QUhospZyDSVpwUTN3djlPOW8>.

### III. PROJECT SCOPE, SCHEDULE & COST

#### Project Scope

The selected consultant will provide the City with professional services to realize the successful completion of a Diversity & Equity Strategic Plan.

The Plan must research, analyze, and make recommendations with respect to each of the three draft plan goals:

#### Goal 1: Eliminate race-based disparities across all City departments

- All substantial existing municipal disparities should be identified and documented. Specifically, consultant must work with Human Resources Department to document racial disparities between the workforce and the population served by the City.
- The draft plan includes the statement that “The City budget reflects a commitment to support diversity and equity goals”. Consultant will:
  - Review municipal operations (specifically the HR Department, “We All Belong” Program, and the Public Engagement Specialist), advise on ways in which Burlington is not meeting best-practice standards, and advise what new or enhanced duties could be performed by a new Diversity & Equity position
  - Review current municipal Diversity & Equity training and advise on any recommended changes
  - Estimate budget implications of any operational recommendations
- The draft plan recommends the creation of a Burlington Office of Equity and Civil Rights. Consultant will document other cities (particularly of similar size and/or demographics as Burlington) that have comparable offices, the duties of those offices, and the budget implications of such offices, as well as advise on the potential duties of a Burlington Office of Equity and Civil Rights with respect to the current activities of the existing State of Vermont Human Rights Commission. Further, consultant will include cities that, in lieu of a stand-alone Office of Equity and Civil Rights, have staff charged with supporting diversity and equity issues within their human resources or other departments.
- The draft plan recommends the creation of a Burlington Inclusion and Racial Equity Commission, perhaps enabled by a voter-endorsed amendment to the City’s municipal charter. Consultant will document other cities (particularly of similar size and/or demographics as Burlington) that have comparable commissions, the duties of those commissions, and the budget implications of such commissions, as well as advise on the potential duties of a Burlington Inclusion and Racial Equity Commission with respect to the current activities of the existing State of Vermont Human Rights Commission.
- Consultant will review Diversity & Equity Goals Grid and take other appropriate steps necessary to finalize the plan with respect to this goal.

#### Goal 2: Promote inclusion and engagement of all community members

- Over the past year, the City has restructured its Public Engagement Specialist position to be an advisor to all municipal departments on inclusive public engagement of underrepresented populations. Consultant will review these efforts and advise on further enhancements of these efforts based on best practices in other municipalities.

- Consultant will review City contracting and grant-making practices and advise on new protocols consistent with municipal best practices that would further the City's inclusion goals. (This work will be used to apply to Goal 3 as well.)
- Consultant will advise on actions the City should take to broaden its message of inclusion, including: (i) the addition of an inclusion statement to website and other documents, (ii) steps the City should take to improve affirmative marketing in all Burlington promotional materials (including Parks & Recreation seasonal brochures, airport marketing publications, Chamber of Commerce marketing publications, etc.), and (iii) any new steps the City should take with respect to housing (consultant should review the Oak Park Regional Housing Center and advise on any lessons for Burlington from this unusual office).
- Consultant will review Diversity & Equity Goals Grid and take other appropriate steps necessary to finalize the plan with respect to this goal.

### Goal 3: Eliminate race-based disparities in the greater Burlington community

- Draft plan includes some data and information about race-based disparities in the broader community. Consultant will augment, refine, and illustrate professionally these and other documented disparities.
- In recent years, a broad consensus has developed indicating that public investment in early childhood education is critical for addressing poverty and its related race-based disparities. New policies for improved early childhood education currently are being developed and implemented at the State and National level. Consultant will review these policies, review actions being taken by progressive municipalities in this area, and make recommendations for what strategic steps the City should take to better ensure that all Burlington children receive high-quality early childhood education.
- Consultant will review Diversity & Equity Goals Grid and take other appropriate steps necessary to finalize the plan with respect to this goal.

### Project Schedule

The City anticipates the selection of the consultant the week of October 21, 2013, with work commencing with a kick-off meeting as soon as possible thereafter.

RFP responses should detail how consultant plans to approach the scope of work, including the anticipated meeting schedule. The Mayor's Office will ensure that City personnel will collaborate closely with consultant and supply all needed and available information to consultant in a timely manner.

Consultant will submit a draft plan to the City by December 2. City will issue coordinated feedback by December 9.

Final plan is due by January 17 with anticipation that the City Council will consider adoption at their January 27, 2014 meeting.

Notwithstanding the deadlines for the final report, Consultant will work closely with the City to make recommendations with respect to a new Burlington Inclusion and Racial Equity Commission on a timeline that allows the Burlington City Council to consider a Charter Change to create such a Commission on the March 2014 ballot (which would require official actions by the Council in December 2013 and January 2014).

### Project Cost

Cost for completing the scope of this contract, including all reimbursable expenses, is capped at \$20,000.

## **IV. PROCESS OVERVIEW, SUBMITTAL CONTENTS & REQUIREMENTS**

### Selection Process Overview

This process begins with the receipt of proposal submittals in response to the RFP outlined herein. Applicants will receive a confirmation email once their submittal is received. Proposals will be evaluated, and invitations will be made to the top-ranked consultants to participate in an interview conducted by a selection committee.

Consultants not selected for an interview will be notified of the selection outcome.

### Submittal Contents

The City seeks qualified consultants with the attributes set forth above in Section II. Proposals that commit to completing the project scope at lower cost than the contract cap are desired and will be viewed favorably.

Submittals should be limited to no more than 5 pages and contain:

- A. **Cover letter** highlighting relevant skills and experience, explaining the applicant's understanding of the project and planned approach
- B. **Cost proposal for services**
- C. **Resume and references** (for each individual if applying as a team)
- D. **Supplemental electronic links** to other similar documents or projects undertaken

## **V. EVALUATION CRITERIA**

Submittals will be evaluated by the hiring sub-committee of the Diversity & Equity Committee using the following criteria as a measure of the applicant's ability to successfully complete the project scope of work. Consultants will be scored up to a maximum of 100 points based on the following:

1. **Experience & Qualifications** (25 pts)
2. **Depth of Skills** related to strategic planning and facilitation (25 pts)
3. **Level of Understanding** of the project, goals, issues, and local need (15 pts)
4. **Ability to Meet Budget/Value/Schedule** (20 pts)
5. **Quality, Clarity, and Completeness of Submittal Package** (15 pts)

## **VI. TERMS & CONDITIONS**

### Communications

It is extremely important that all respondents are given clear and consistent information. Therefore, all respondents are required to submit any questions related to this project or RFP process in writing so answers can be distributed to all potential respondents. Questions must be received by the time frame outlined in Section I.

Respondents should not communicate with any City department or employee about the submission during the process, except as described above. In addition, no communications should be initiated by a respondent to any City official or person(s) involved in evaluating or considering the statement of

qualifications. Communication with any parties other than those expressly described herein may cause a respondent to be disqualified from participating.

#### Other terms

Costs for preparing the proposal in response to this request are solely the responsibility of the respondent. The Ad Hoc Diversity & Equity Committee, the hiring committee, and the City of Burlington reserve the right to accept or reject any or all proposals, with or without cause, and to waive immaterial defects and minor irregularities in responses. All decisions related to this solicitation by the City will be final. The City reserves the right to request clarification of information submitted and to request additional information from one or more respondents. All materials submitted in response to this RFP will become the property of the City upon delivery. This solicitation in no way obligates the City of Burlington to award a contract.

#### Equal Opportunity

The selection of a consultant shall be made without regard to race, color, sex, age, religion, national origin, or political affiliation. The City of Burlington is an Equal Opportunity Employer and encourages proposals from qualified minority- and women-owned businesses.

It will be necessary for responding parties to comply fully with the terms and conditions outlined in this document if they are to be considered. A letter attesting that the respondent has read, understands, and followed all procedures is a part of this RFP and must be included as part of the final submittal (see Attachment A).

**ATTACHMENT A**

Understanding of RFP Procedure, Terms, and Conditions

***This page to be returned with qualifications submission***

I acknowledge that I have read and understand all procedures and requirements of the above-referenced RFP and have complied fully with the general terms and conditions outlined in the RFP.

Consultant's Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Representative's Signature: \_\_\_\_\_

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

## Diversity & Equity Goals Grid

<b>Goal 1: Eliminate race-based disparities across all City departments.</b>			
<b>Objective</b>	<b>Actions</b>	<b>Leads</b>	<b>Measurements &amp; Accountability</b>
1. City leadership sets direction and charts a clear course, establishing high expectations using data to track progress and hold all City employees accountable for performance and contribution toward diversity and equity goals.	a) City leadership highlights equity and inclusion goals as top City priorities, and speaks to them often.	Mayor	State of the City, City Council meetings, Department Head meetings, public presence at community events, etc.
	b) The City budget reflects a sustaining commitment to support diversity and equity goals, will be assessed with an equity lens, and will provide funding for: <ul style="list-style-type: none"> <li>• Diversity &amp; Equity position</li> <li>• City employee diversity and equity training</li> <li>• Interpreter Services</li> <li>• Other resources as identified</li> </ul>	Mayor CAO HR CEDO	FY15 Budget contains line items that reflect these initiatives and priorities; tools are developed to measure equity in budget
	c) A Core D&E Team comprised of City Leaders is created to implement, monitor assess and report progress of strategic plan.	Mayor &Core Team	Team comprised of at least HR Director, CAO, Chief of Staff, CEDO Director & City Attorney formed & meets regularly
	d) Departmental D&E working groups to identify, monitor and track inequities within departments. Come up with strategic plan with actions on how to address disparities.	Mayor Dept. Heads	Department specific plans in place by June 2014; built in to performance review
	e) City leadership and department directors receive mandatory executive level diversity and equity training.	CAO/HR	Training takes place annually; coaching available as needed
2. City workforce reflects the City's diverse	a) HR will provide a report outlining demographics of	HR/CEDO	Annually assess

<p>population and values and demonstrates a commitment to diversity and equity in their work for the City.</p>	<p>new hires, promotions and turnover highlighting areas of underutilization/underrepresentation.</p> <p>b) Each department working in conjunction with City HR, develops strategies to address underutilization demonstrating commitment to equal employment opportunity and nondiscrimination policies</p> <p>c) Every hiring decision goes through an assessment to determine that underutilized populations, particularly ethnically diverse populations, are at least proportionally represented at all positional levels in the City workforce.</p> <p>d) The City's commitment to diversity and equity is clearly communicated during new employee orientation and all current and new employees will be required to complete on-line diversity training</p> <p>e) All employees are evaluated, during the annual performance evaluation process, on the outcomes of recruitment, retention and promotion efforts, making program changes where desirable or necessary.</p> <p>f) Existing policies and procedures will be reviewed and updated on an ongoing basis.</p>	<p>HR/CAO</p> <p>HR</p> <p>HR</p> <p>HR Dept. Heads</p> <p>HR</p>	<p>demographics of City workforce</p> <p>Department-specific plans in place by June 2014; built in to performance review</p> <p>Progress assessed and reported on every six months</p> <p>Documentation of training will be kept in personnel files</p> <p>Documented in performance evaluations Kept in personnel files</p> <p>Scheduled along with biennial policy review</p>
<p>3. Increase active representation on City Boards and Commissions to reflect diversity of community.</p>	<p>a) Assess demographics of all City Boards and Commissions annually.</p> <p>b) Actively recruit a more diverse applicant pool for all vacancies to serve on boards and commissions.</p> <p>c) Provide training to commissions and boards regarding City</p>	<p>C/T Office</p> <p>City Council</p> <p>C/T</p>	<p>Report made to City Council in March</p> <p>City Council policy statement</p> <p>Annual fall training</p>

	priority for diversity and equity. d) Messaging on each web page encouraging diverse pool of applicants	Office C/T	established Reviewed and updated
4. Creation of Office of Equity and Civil Rights.	a) Community members can report bias incidents and civil rights violations that occurred with a City employee or program and receive advocacy and support. b) Independent Compliance Officer can use data to establish and advocate for best practices in City government.	CAO & City Attorney	Database established to track incidents and follow-up; goal to reduce number of incidents is set

**Goal 2: Promote inclusion and engagement of all community members.**

<b>Objective</b>	<b>Actions</b>	<b>Leads</b>	<b>Metrics &amp; Accountability</b>
1. Each department is trained in best practices for meaningful community engagement and can demonstrate how they will outreach and provide inclusive, equitable services.	City-wide guidelines and principles are established to ensure that outreach and services are inclusive and reach diverse populations.	Dept. Heads & CEDO	Effectiveness evaluated and updated annually with community input
2. The City provides key service information that is widely available to diverse populations in print and on the City website in the most popular languages.	Each Dept. D&E working group will identify the most critical information that needs to be translated and interpreters will be compensated for services.	Dept. Heads & Clerk/Treasurer's Office	Community resources will be checked and refreshed annually
3. Public engagement includes targeting underrepresented populations.	Each Dept. D&E working group will identify projects that require public input for targeted public engagement, including budgeting for interpreters and supports for attendance at public meetings.	Dept. Heads & CEDO	Effectiveness evaluated and updated annually with community input
4. City contracts reflect the City's commitment to	All new City contracts and grants made with businesses and	CAO &	

diversity and equity.	organizations will require their anti-discrimination policy to be on file with the City. If such a policy does not exist, the City will ask that one be created before entering into a contract or grant with the other party that includes at least the following protected classes: race, color, sex, age, national origin, religion, ancestry, place of birth, sexual orientation, gender identity, physical or mental condition and HIV status.	Dept. Purchasing Authorities	
5. Free trainings are provided in various languages about how the City works and the services it provides.	In consultation with large underrepresented populations, public engagement specialist determines frequency and location of trainings. Short 1-2 page booklet on City services is provided in main spoken languages.	CEDO & Clerk/Treasurer's Office	

### **Goal 3: Eliminate race-based disparities in the greater Burlington community.**

<b>Objective</b>	<b>Actions</b>	<b>Lead</b>	<b>Metrics &amp; Accountability</b>
1. City guidelines established for partner organizations, agencies and departments receiving funds and support from the City to meet diversity and equity goals.	a) Stakeholder group convened by the City creates guidelines to promote equity and inclusion in partner organizations, agencies, and departments.	CAO & CEDO	Partner organizations, agencies, and departments are evaluated annually to determine future funding and support
2. City promotes organizations, agencies and departments making notable progress in achieving equity.	a) Special recognition at City events and online.	CEDO & Dept. Heads	