



Request for Proposal (RFP)

Subject Matter Expertise:

**Diversity, Equity, Accessibility, and Inclusion (DEAI)
Strategy Development and Implementation**

RFP Released: September 15, 2022

Proposals Due: November 30, 2022

Point of Contact

Carol Webster, c/o clubadmin@rotary8.org

Objective:

The Rotary Club of Tacoma (Rotary #8) seeks an analysis of its cultural climate and activities since the club wrote its DEAI Statement in August 2020. It also seeks examples of successful DEI strategies used by volunteer organizations, as well as a Roadmap for how to proceed to make Rotary #8 more welcoming to all.

Background:

Rotary is an international volunteer organization whose purpose is to bring together business and professional leaders to provide humanitarian services, to encourage high ethical standards in all vocations, and to advance goodwill and peace around the world. There are more than 1.2 million Rotarians in over 35,000 Rotary clubs worldwide. Rotary International has spoken on Diversity, Equity, and Inclusion (DEI) and you will find information here www.rotaryinternational.org.

The **Rotary Club of Tacoma (Rotary #8)** was established in 1910, and is the 8th oldest Rotary Club in the world. Rotary was created in Illinois and was originally a male only volunteer club. After 1987, (see Rotary International v. Rotary Club of Duarte, California, 481 U.S. 537) Rotary was open to women. Our club currently has over 230. See www.rotary8.org.

Rotary clubs throughout the world are organized into Districts, and Rotary #8 is a member of District 5020 that encompasses Vancouver Island, Canada, and Western Washington, USA, from Pierce County to Woodland, Washington, including the Olympic Peninsula. There are 91 clubs in District 5020, 37 in Canada and 54 in the USA, and almost 4,400 Rotarians. There are 19 clubs located in Pierce County, Washington. Rotary #8 is the oldest and the largest in Pierce County.

Rotary #8 and DEAI Background

Rotary #8 created a DEAI Committee and it wrote Rotary #8's DEAI statement. The statement was approved by the Board of Directors in August, 2020. The following is our statement:

The Rotary Club of Tacoma #8 is open to all people who want to make positive changes in our community and world. We welcome all members and guests, regardless of race, nationality, religion, faith, gender, sexual orientation, cultural background, and ability.

We will not tolerate racism. We strive to become an anti-racist organization. We are committed to learning more about how systemic racism has led to inequality in all systems – including education, housing, health, employment, wealth accumulation, policing, prosecution, sentencing, and incarceration – and working to eradicate inequality wherever we encounter it. We will take these actions:

- *We will review and update our Club's procedures, policies, meetings, events, communications, grants, projects, scholarships, and traditions.*
- *We will broaden our recruiting practices to align our membership more closely with the demographics of Tacoma.*
- *We will use our grants, projects, and scholarships to promote diversity, equity, inclusion, and social justice in our community.*

DEI Training and Voluntary Organizations:

The majority of Diversity, Equity and Inclusion (DEI) training is geared towards the workplace (e.g., a business, higher education, or a governmental agency). Under most circumstances, an organization's focus is on operational efficiency, with the hope that training on cultural differences will rid the organizations of bias and discrimination and lead to greater productivity.

Rotary Clubs, however, are **volunteer** civic groups, whose members are community service-oriented people, sharing common philanthropic goals. Because Rotary #8 is a **voluntary** organization, whose members pay dues to belong (and to donate back to the community), a Rotary president of Board of Directors **cannot** mandate that all members attend DEAI classes or take them online. Within Rotary, DEAI can be highlighted, valued, and strongly suggested. The Rotary#8 Board, in adopting the DEAI Statement in 2020, accepted the idea that Rotary #8 would review its practices and attempt to improve them.

Purpose of RFP:

With Rotary International's statement on DEI, and Rotary #8 having done some work on DEAI, we now want an analysis of our cultural climate and activities since the club wrote its DEAI Statement in August 2020. We also seeks examples of successful DEI strategies used by other volunteer organizations, as well as a Roadmap for how to proceed to make Rotary #8 more welcoming to all.

The Rotary Club of Tacoma #8 invites proposals to provide a professional, outside, objective research assessment of where Rotary #8 is currently, after the Board has accepted the DEAI statement, and after the DEAI committee has presented several recommendations to the Board of Directors.

The consultant or organization will provide a written report(s) to Rotary #8 about the Club's understanding of DEAI, the current club "climate," successes and disappointments, what has been implemented and what is yet to be done. The consultant or organization also will provide examples of successful DEI strategies used by volunteer organizations and a Roadmap of specific steps to be taken to make Rotary #8 more welcoming to all, and a leader in DEAI. Our intention is to commit to a sustained DEAI strategy.

Time Period

Time period for services is January 15, 2023 through May 30, 2023. We anticipate that this work will be done in stages.

Budget

At this point in time, we have \$10,000 committed, and we anticipate more funding.

Available to You for Your Analysis:

You will have the results of the survey developed by Rotary #8's DEAI Committee and taken by **168** of the club's members.

You also will have the recommendations submitted by Rotary #8's DEAI Committee to the Board of Directors about procedures and policies, meetings, events, communications, grants, projects, scholarships, and traditions.

Scope of Work and Deliverables:

1. Analyze the climate of Rotary #8 regarding DEAI.
2. Identify Rotary #8's organizational strengths and shortcomings regarding DEAI, with clear recommendations on how to build strengths.
3. Identify which DEAI recommendations have been put into place which have not.
4. Provide examples of successful DEAI activities used by volunteer organizations.
5. Create a clear Roadmap, with specific short- and long-term actions to enhance performance in DEAI, knowing that the Rotary #8 President will change each July, and Board of Directors members will change every three years.

Information Requested:

Proposals must be submitted, **electronically**, no later than 4:30 p.m., on November 30, 2022.

Note: Proposals will **not** be considered if they are longer than 25 pages.

Responses to this RFP will be evaluated according to the Evaluation Criteria outlined in the next section. After an initial evaluation using these criteria, Rotary #8 will determine which, if any, applicants will be interviewed. During the interview, the selected applicants will be given the opportunity to discuss their proposal and answer questions from the interview panel.

Proposals **must** contain the following:

- **Signed Attestation:** *Page Limit - 1 page.*
- **Description and Capability of Organization and Resume(s).** *Page Limit - 2 pages for description and capability of organization, and 2 pages for each expert's resume.*
Resume(s) for each expert showing education and appropriate professional experience and/or education and reflecting knowledge and consultation experience specific to DEI plan development and implementation. Highlight experience working with non-profit organizations. Capability statement that demonstrates you or your organization's ability to deliver the products described.
- **DEI Analysis Work Samples:** *Page limit - 5 pages.*
Demonstrated evidence of prior experience for developing, executing, and performing a comprehensive DEI organizational analysis. This work sample may be an environmental scan and/or may include examples of identifying gaps, examples of successful activities used by volunteer organizations, recommendations for improvement, suggestions on how to implement, etc.
- **Research Design:** *Page Limit - 5 pages.*
How you will approach delivering the products identified in the Scope of Work and Deliverables.
- **Budget Justification:** *Page Limit - 2 pages*
Budget justification for who will work on the project, report preparation, and delivery of final report(s) to Rotary #8.
- **Contact Information of at Least Three References:** *Page Limit - 1 page.*

Signed Attestation:

ATTESTATION

By my signature below, I hereby certify that this Proposal reflects my best estimate of the capability of my organization and the true and necessary costs for the project, and the information provided herein is accurate, complete, and current as of the date of my signature below.

I agree that my electronic signature is the legal equivalent of my manual signature on this application. By typing my name below, I certify that the information provided in the application is true and accurate.

Print Name:

Title:

Organization:

Website:

Email Address:

Mailing Address:

Telephone Number:

Signature:

Date:

Evaluation Criteria

Evaluation Domain	Evaluation Criteria To earn full points in each domain, the applicant must demonstrate:	Points
Description and Capability of Organization, and Experience of staff	<p>Description and Capability of Your Organization and Resume(s) for each expert, to show professional experience and education that reflects knowledge and consultations specific to DEI plan development and implementation. Demonstrated experience with non-profit or service organizations will be given consideration.</p> <p><i>Page limit for description and capability of Organization: 2 pages</i> <i>Page Limit for Resume(s): 2 pages per staff / expert</i></p>	5
Work Samples	<p>Work samples to demonstrate prior experience in conducting DEI analysis of organizations. These work samples may be an environmental scan or examples of identifying gaps, examples of successful activities used by volunteer organizations, recommendations for improvement, suggestions on how to implement actions, etc.</p> <p><i>Page Limit for Work Sample: 5 pages</i></p>	5
Research Design	<p>Research Design that describes exactly how you plan to analyze Rotary #8's DEAI "climate" and deliver the products described in Scope of Work and Deliverables.</p> <p><i>Page Limit for Research Design Statement: 5 pages</i></p>	5
Compensation and Budget Justification	<p>Budget justification shows cost rate for experts and administration for project implementation, inclusive of preparation and delivery to Rotary #8.</p> <p><i>Page Limit for Budget Justification: 2 pages</i></p>	5
References	<p>Include all contact information of at least three (3) references for whom you have provided DEI services.</p> <p><i>Page limit: 1 page</i></p>	3
Completeness of Application	Application materials submitted are clear, complete, and responsive to RFP guidance, including page limits.	2
Total Points Possible		25