

Request for Proposals to Execute UWGC Equity Audits, Climate Assessment, and Community Perceptions Study

Proposals Due: February 4, 2019 5:00 p.m.

Submit by email to: impact@uwgc.org

I. About United Way of Greater Cincinnati and an Overview of Diversity Equity and Inclusion:

United Way of Greater Cincinnati (UWGC) is an organization with a 100-year history of uniting communities to change lives. UWGC leads and convenes with a nimble staff of 110 employees that diligently works with agency partners, individuals, corporate and community organizations in 10 counties throughout Greater Cincinnati and across Northern Kentucky and Southeast Indiana. UWGC brings our region together to strengthen the building blocks for a better life to achieve economic self-sufficiency for all. More information is available at www.uwgc.org.

For over 10 years, UWGC has displayed interest in recognizing diversity and inclusion within the organization and the communities served. To date, the efforts implemented have consisted of tactics geared towards building foundational level of D&I awareness among staff and support of events celebrating our diverse community. During the 2017 investment process, we were intentional about investing in organizations led by people of color and those with strong community connections. In June of 2018, the organization displayed a great commitment to the community by hiring its first Director of Diversity, Equity and Inclusion; a dedicated full-time staff person tasked with developing and implementing a comprehensive DEI strategy. In December of 2018, the UWGC executive team approved a revised organizational structure positioning DEI as an integrated organizational function across all business pillars (Impact, Development, Brand and Engagement, People and Operations). The UWGC DEI strategy has been developed around four pillars: Workforce, Workplace Culture, Community, and Commerce. Our goal is to foster authentic appreciation for all dimensions of the human experience by building inclusive internal and external communities through the implementation of strategies and systemic transformation that ensures everyone within our region is treated with dignity, respect, and has the opportunity to thrive.

II. Project Scope:

UWGC has reached a pivotal moment and is committed to becoming a world class inclusive and equitable organization. UWGC seeks partners to engage in a project(s) that will result in a holistic evaluation of UWGC. This evaluation will include a detailed analysis of the organization's current internal state/baseline of equity and inclusion, measure external perceptions of the organization, its programs and services, and will make recommendations for incorporating equity and inclusion principles and strategies into operations, programs, services and policies.

UWGC invites partners to submit proposals for any one, two or all components of the evaluation:

1. A series of holistic **equity audits** centering around race and the intersections of gender, age, and level within the organization. We are requesting that the audit be inclusive of all internal functions (Impact and Community Investments, Development, Brand and Engagement, People and Operations); including, but not limited to, workforce (including compensation, educational obtainment, and external developmental opportunities), board/cabinets, funded agencies, policies, procedures, grant making, and agency evaluation- with a lookback period of at least three years.
2. An **organizational climate assessment**- We are requesting an organizational climate assessment to quantify the experiences of inclusion across various demographic group, generating an organizational baseline for ongoing measurement post intervention.

3. An individual/organizational **cultural competency** evaluation- We are requesting an evidence-based framework to evaluate internal (staff, board, and committee) cultural competency. Examples of framework: intercultural development inventory, cultural intelligence, or a comparable evaluation tool for assessing and measuring individual/organizational cultural competency.
4. A **community stakeholder perceptions study**- considering very public recent events and anecdotal feedback highlighting community distrust among segments of the UWGC10 county service region, we are also requesting a partner to fulfil. We are requesting a stakeholder perceptions study to better understand how UWGC is viewed externally- within the communities we serve, the relationships between constituents and UWGC, and areas of opportunity to be more intentional in broader community engagement. This study should be inclusive of, but not limited to, community members from our 10-county service region, UWGC funded agencies and community partners, donors, volunteers, and other local non-profit leaders not currently funded by UWGC across various demographics (race and ethnicity, sex, gender, ability, sexual orientation, socioeconomic status, education, etc.) groups.

Proposals should include approaches that will best address the goal of the project and incorporate the following objectives:

- **OBJECTIVE 1: Comprehensive Study and Recommendations.** Communicate opportunities to be a more equitable and inclusive organization and any additional findings in ways that are digestible. Offering methodical diagnosis of root causes and metrics for strategic intervention supported by research based best practices. Final UWGC deliverables should include both a comprehensive report, executive summary, and a guide for other organizations seeking to become more inclusive and equitable.
- **OBJECTIVE 2: Broad Community Engagement.** Reach and engage individuals/organizations including and beyond current stakeholders/partners to understand experiences, barriers, and opportunities to be more inclusive and equitable.
- **OBJECTIVE 3: Identify perceptions and opinions around UWGC and opportunities to become more equitable and inclusive.** Understand the experiences and expectations of both (1) UWGC staff, board and cabinet members and (2) community members, clients, customers, and partners through community perceptions of UWGC.
- **OBJECTIVE 4: Identify specific opportunities for UWGC transformation.** Evaluation activities should include efforts to identify each of the following:
 - Teaching/learning moments that provide opportunities to increase cultural competency, self-awareness, and reinforce behavior change;
 - Opportunities to incorporate constituents with lived experience and community leaders into UWGC structures (advisory group/committees/board) allowing UWGC to embody the “Nothing for us without us” tagline of recent social movements; and
 - Opportunities to increase transparency around UWGC’s focus on racial equity and organizational culture transformation.

Upon completion of the outlined assessments, the following deliverables will be provided to UWGC:

- a) comprehensive reports detailing both qualitative and quantitative findings,
- b) executive summary that reflects and summarizes findings and recommendations that can be transparently shared with internal and external stakeholders,

- c) subsequent recommendations from each audit/assessment categorized in a format that outlines phased tactical implementation to produce goals of the project (goals and objectives outlined in section II),
- d) detailed outline of the research process; inclusive of case studies, and a step by step process leveraging our journey as a learning experience for other agencies to conduct a self-assessment/audit in support of a more equitable and inclusive community, and philanthropic/non-profit ecosystem

Any/all partners selected will work with a cross functional team of internal and external experts to design the tactical approach of execution and framework to communicate findings of services rendered. The expectation would be close collaboration with others if selected for “subsections” of the work to ensure continuity of information across the multiple requested assessments.

III. Partner Requirements:

The selected partner **must** provide narrative to describe their extensive experience and expertise conducting comprehensive research evaluations in the areas of: racial equity, organizational climate assessments, and/or community perceptions studies.

The ideal partner will provide narrative responses around the following criteria (no more than 200 words per question):

1. Organizational capacity to complete the outlined work within the project timeline- audit/assessment phase should run from February 2019 through no later than November 2019 with a final product that is accepted by both the partner rendering services and the UWGC executive leadership team by no later than December 31, 2019. *Dates may vary if multiple organizations are selected to partner for various components of work.*
2. Diverse local relationships and understanding of the UWGC 10 county region.
3. Actions that reflect an investment in creating a more inclusive and equitable Greater Cincinnati non-profit/philanthropic community.
4. Willingness to work with United Way teams and volunteer groups to determine appropriate measures of success.
5. Experience working with organizations navigating culture transformation.
6. Standing as a diverse business enterprise (MBE, WBE, LGBTBE, VBE, etc.), non-profit, or social enterprise.
7. An organizational commitment to operationalizing equity. *For firms submitting proposals for the equity assessments, we are asking how you are specifically operationalizing racial equity within your own organization.*

IV. Proposal Requirements:

Responses provided to the questions below will be used to evaluate companies best suited to fulfill requested services outlined in project scope section and achieve desired goals (no word limit):

1. Summarize your firm’s background, resources, relevant experiences, lessons learned while operationalizing similar work with other organizations, references, and capacity to execute the requested services.
2. Understanding of the requested services reflected in the proposal by way of project objectives, business requirements, business vision, and desired outcomes.
3. Proposed framework for the equity audits- examples:
 - awareness, understanding, transformation (Ferguson Framework)
 - or normalize, organize, operationalize (RaceForward)

4. Strategy outline including a roadmap with phased approach to fulfill UWGC project goals including quarterly milestones for fulfillment of tasks.
5. Breakdown of fees for service and total project cost- if submission is for multiple requested services, provide a cost breakdown for each service item.
6. Identification of staff members that will execute each component of the work and the primary point of contact for UWGC DEI leader.

All information, content, and data collected and generated will be proprietary information owned by UWGC.

V. Grant Awards:

Proposals will be accepted for any one, two, three or four of the outlined requests, (equity audits, climate assessment, community stakeholder perceptions study).

- Proposal reviews will take place in February. Respondents will receive follow up notifications detailing next steps from UWGC by 2/28/19.
 - Considering the wide-ranging request, there is no defined budget guidelines to be conveyed during the RFP process.
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Submission Instruction(s)

- All proposals should be received by 5:00 p.m. on February 4, 2019. E-mail to impact@uwgc.org
- All proposals should be in pdf form with “UWGC Equity Audit, Climate Assessment, and Community Perceptions Study- *YOUR ORGANIZATIONS NAME* in the subject line
- General questions should be directed to impact@uwgc.org
- There will be an informational session held on 1/14/19 from 11:30 a.m.-12:30 p.m. (EST)
 - To register email impact@uwgc.org with “UWGC RFP Info” in the subject line and a follow up notice will be sent with logistical details