REQUEST FOR PROPOSALS:  
DIVERSITY EQUITY AND INCLUSION ASSESSMENT

A. Introduction
The Public Health Institute (PHI) is a global leader in public health. PHI is dedicated to promoting health, well-being and quality of life for people around the world through innovative solutions and collaborative partnerships. Through this Request for Proposals (RFP), PHI seeks bidders to provide the services and specifications as outlined below.

B. Proposal Format
In order for PHI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

1. Past Performance Overview – A description of the bidder’s relevant experience and a list of 2 professional references (1/2 page)
2. Technical Approach – (1 page)
   a. Description of consultant’s working definition/philosophy and framework for approach towards organizational DEI change
   b. Project timeline/key milestones
3. Price Proposal – A description of the bidder’s proposed cost and how the cost was determined (excel spreadsheet or ½ page)
4. Contact Information – A statement of main point of contact for negotiations
5. Supplemental materials –
   a. Statement of qualifications
   b. Examples of work products from similar projects
   c. Examples of lived experience (if applicable)

C. Submission of Proposals & Closing Time
Proposals should be submitted as a single pdf file.

Please submit proposals to: DEI Review Committee
                          Email: DEIProposals@phi.org

Proposals are due by: Tuesday June 30, 2020
                      5:00pm – Pacific Standard Time

D. Solicitation Guidelines

1. Agreement
PHI intends to issue a Firm Fixed Price agreement to the successful bidder from this procurement process. The agreement will outline approved billing rates for each type of service provided and the terms and conditions applicable to the work performed.
2. Discretion
PHI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. PHI may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet PHI’s business needs.

3. Offers/Quotations
Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Quotes prices should remain valid for ninety (60) calendar days from proposal submission.

4. Proposal Costs
There is no reimbursement for costs associated with preparing or submission of proposals in response to this request for proposals or costs associated with possible award negotiation.

5. Proposal Evaluation
PHI will select the bidders whose offer will provide the most favorable mix of technical credentials and cost, thereby ensuring overall best value procurement.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI. Bidders should review the criteria as outlined in section E.2 carefully in developing their responses to this RFP.

- Technical Approach - 40%
- Past Performance and Qualifications - 35%
- Cost Realism and Competitiveness - 25%

Preference will be given to vendors certified as small businesses as defined in section F below, or similarly aligned. Certification should be provided as part of proposal package.

E. Required Services

1. Service Type(s): Technical Assistance

2. Statement of Work:

PHI is dedicated to improving health and wellness by discovering new research, strengthening key partnerships and programs, and advancing sound health policies. During its more than 50 years as an independent nonprofit, the Public Health Institute has led and managed hundreds of projects and programs ranging from small task order contracts to large, multi-site research programs with national and international significance.

PHI has 700 total employees, 85 central office staff supporting 615 employees in more than 60 different public health related programs. PHI's curated portfolio focuses on the ideas, programs and individuals positioned to transform health. We restructure food systems, build the capacity of diverse public health and healthcare leaders, in the U.S. and globally, tackle emerging diseases, use tech to speed healthcare delivery, amplify local leaders, and much more.
PHI is committed to diversity, equity, and inclusion and issued a DEI policy statement in 2018 to all staff. We have a DEI committee consisting of a cross section of central and program staff at all levels of the organization and with diverse ethnic, socioeconomic, gender, and other backgrounds that aims to push forward a more diverse, equitable, and inclusive experience for all PHI employees.

We are seeking the services of a qualified company/professional to carry out a Diversity, Equity, and Inclusion (DEI) organizational assessment as outlined below:

1. **Assess** current state of DEI efforts at PHI:
   - Review existing DEI CEO policy statement, other materials created by the DEI Committee, survey results from PHI Best Place to Work Survey, and other existing data
   - Interview key staff through phone or in-person interviews
   - Conduct electronic survey of PHI Employees as needed.

2. **Perform gap analysis**
   - Identify and share relevant, evidence-based best practices of DEI “gold star organizations”
   - Measure, analyze, and compare the gap between the baseline and best practices.

3. **Provide recommendations to decrease gap between current and desired states**
   - Provide recommendations of next steps to decrease the gap between desired and current organizational state including draft workplan with measurable outcomes and suggested timelines
   - Recommendations should include suggested changes to the organizational culture at PHI and how those changes could influence the programmatic work in PHI programs
   - Recommendations should include cost estimates to implement.

4. **Facilitate DEI learning and capacity development of DEI committee throughout project period.**

**Past Performance/Qualifications**
Desired characteristics of the organization or individual submitting a proposal are as follows:

- Proven understanding of Diversity Equity and Inclusion issues from a programmatic perspective, not exclusively with a human resources lens.
- Experience with/knowledge of fiscal sponsor and/or philanthropic organization models
- Experience with developing interview questions/surveys, and performing assessments
- Organizational change expertise and track record of evaluation success
- Able facilitator of conversation


**Timeline**
The bidder should be able to begin the assessment within 30 days of notification of selection and provide an expected timeline to complete all services.

**Estimated budget**
PHI’s estimated budget for this effort is $20,000. Bidders should provide a realistic cost estimate consistent with their proposed technical approach.

3. **Location(s):** PHI Central is based in Oakland, California with satellite offices in Sacramento, CA, Washington, D.C., and Monrovia, CA and employees working throughout the United States and Worldwide. Ideally, the bidder would be able to visit the Oakland, CA office as part of the assessment, however accommodations for video may be made, if needed.

4. **Deliverables:**
   - Provide written report including at a minimum the 3 elements outlined in the Statement of Work, above.
   - Provide any instruments/materials developed for the process
   - Provide draft DEI work plan with measurable outcomes and suggested timelines
   - Present findings to DEI Committee in person or via video

**F. Diversity and Inclusion**
PHI is dedicated to promoting diversity in its procurement of goods and services. Pursuant to PHI’s commitment to diversity, PHI encourages vendors that are certified as any of the following businesses:

- WOSB: Women-Owned Small Business
- SDVO: Service-Disabled Veteran-Owned Business
- HUBZone: Historically Underutilized Business Zone
- SDB: Small Disadvantaged Business
- 8(a)BD: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American