



Request for Proposal #2021-071
Diversity, Equity, and Inclusion Consultant
ADDENDUM No. 1

ISSUE DATE: April 22, 2021

Offerors on this project are hereby notified that this Addendum shall be made a part of the above named RFP document.

The following items add to, modify, and/or clarify the RFP documents and shall have the full force and effect of the original documents. This Addendum shall be acknowledged by the offeror in the RFP document.

A) Add/Delete

- 1) TAB F – Price Information, **ADD** the statement listed below to this section:
 - Provide a fixed fee amount for each segment of your proposal and a total fixed fee for all segments of your proposal.
 - 2) Cover page: **Delete** incomplete Telephone: (704)-283-356 for Cheryl Wright and **REPLACE** with “(704) 283-3563”
 - 3) **ADD** “Attachment D”, Message from County Manager, Mark Watson to UC Colleagues regarding Diversity, Equity and Inclusion.
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B) Questions and Answers

- 1) **Question:** We are based in Atlanta and wanted to confirm that you will accept proposals from firms located outside of NC. Please let me know.

Answer: All Interested companies that meet the requirements listed in this RFP may submit a proposal.

- 2) **Question:** I am located in Durham, NC. My company is less than a year old. However, I have been a diversity consultant for more than 20 years. Do you think we would qualify if we submitted a bid?

Answer: All Interested companies that meet the requirements listed in this RFP may submit a proposal.

- 3) **Question:** I am a small black woman owned business. I founded my company last year. I am the sole employee. I have more than 20 years of diversity and inclusion experience as a consultant. I have worked with for profits and nonprofits on projects of all sizes. I feel I am quite capable of handling this RFP. I hire 1099 contractors when needed. I do not have three years of taxes or financial documents. Will my newness make my company not a viable business?

Answer: All interested companies that meet the requirements of this RFP are encouraged to respond. Provide responses to requested information listed in the RFP. Proposal submissions will be reviewed accordingly.

- 4) **Question:** How many staff does Union County have?

Answer: 1,202 full time employees

Question: What specific certifications or licenses (if any) are preferred for the Consultant?

Answer: Review RFP and provide applicable information as requested.

- 5) **Question:** What is the proposed budget for the study?

Answer: Not available at this time.

Question: What is the requested timeline to complete the study?

Answer: We will work with the selected consultant(s) to identify a timeline that is appropriate and attainable.

6) **Question:** What key factors or events have indicated that diversity, equity and inclusion are critical issues for Union County?

Answer: Refer to section "A", item #3, listed above for background information.

7) **Question:** How might we gain access to Union County's 2020 Annual Report, strategic objectives Community Consensus, Sustainability and Organizational Strengthening adopted by the Board of Commissioners with its focus on support for all employees, residents, and the local business community? How is DEI currently included in strategic objectives?

Answer: (a) Union County's Vision Statement is, "Through continuity of leadership and direction, and built upon consensus of the community, we identify and implement strategies, programs and services, necessary to promote and sustain the quality of life and lifestyles unique to Union County."

(b) Union County Values

- Loyalty to organization and community (commitment)
- Quality of service - Professionalism
- Fairness/Ethics
- Employee development- Long term stability
- Diversity of ideas
- Investment in business systems – Effectiveness
- Personal Initiative - Risk taking- Transparency

8) **Question:** Who is the sponsor of the DEI initiative? Who are the people/positions on the Executive Leadership team to meet with in pre-assessment discussions?

Answers: This is an initiative from the County's Management Team.

9) **Question:** Who in leadership and designated staff (project team) will the consultant work with to develop the DEI goals, objectives and strategies?

Answer: Michelle Lancaster, Deputy County Manager will be the primary contact, however all members of the Management Team will be engaged in the process.

10) **Question:** Who will be the point of contact and reporting relationship for the engagement?

Answers: Michelle Lancaster, Deputy County Manager will be the primary contact. The County is in the process of recruiting a Director of Strategy & Innovation and this position will also be a primary contact.

11) **Question:** Who do you believe would be included on the DEI Advisory Committee and what is the purpose of that committee as it is viewed now?

Answer: We will review recommendations from the selected company.

12) **Question:** How many total employees are within the scope of this project?

Answer: estimated 1,202 full time employees.

13) **Question:** What Union County support will be provided for scheduling/distributing surveys, one on one interviews, or focus groups during the assessment phases?

Answers: Union County will provide support as needed to schedule interviews and/or focus groups and will also distribute surveys as needed.

14) Question: Has the budget for the DEI initiative been approved? If so, what are the parameters?

Answer: Applicable funding is available for this project. Refer to section 6.2 Evaluation Criteria chart.

15) Question: Section 4.3 and 4.5. These sections encourage interested firms or consultant(s) to submit a proposal covering all areas listed in the scope of work section of this RFP.

Would it be possible to break the RFP into phases based on outcomes of the assessment? If not, how do you want an estimate of deliverables prior to the assessment phase and approved strategic plan?

Answer: Responding companies may provide information to support their proposed approach for the sections listed above and other sections listed in the RFP.

16) Question: If an interested firm/consultant submits a proposal covering all areas listed in the scope of work, how do you prefer that totals be broken down for each section/deliverable? Would daily and/or hourly rates be sufficient for many of the unknown deliverables based on the assessment data?

Answer(s): Refer to TAB F, Price Information in the RFP and section A, item #1 of Addendum #1 for guidance.

17) Question: Are there any existing surveys or assessments from the past 3 years that report on workforce engagement related to DEI?

Answer: Union County conducted a bi-annual employee survey that included obtaining feedback on DEI. The selected company will be responsible for gathering applicable information during the assessment process and make applicable recommendations.

18) Question: What leadership assessments (DEI readiness or others) been done in the past 2 years for individual development purposes? If so, what assessment tools have been used or are currently being used?

Answer: Union County conducted a bi-annual employee survey that included obtaining feedback on DEI. The selected company will be responsible for gathering applicable information during the assessment process and make applicable recommendations.

19) Training, Mentoring and Coaching:

Question: What training is in place currently that addresses inclusion and diversity issues?

Answer: The selected company will conduct an assessment that will include gathering this information.

Question: Is there currently a DEI unit? **Answer:** No

If yes, who does the DEI leader report to and how many staff are in the current DEI group?

20) Question: What is the number of employees you anticipate will receive mentoring and coaching?

Answer: 1,202 full time employees (the number may go up or down)

Question: What is the number you would expect to comprise the employee-led DEI Committee?

Answer: To be determined.

Question: What departments will have representatives on this Committee?

Answer: To be determined.

21) Question: What general leadership, communication, team-building training for employees is currently occurring (not just for DEI)?

Answer: The selected company will conduct an assessment that will include gathering this information.

22) Question: How many staff would be included in the training and educations strategy to increase awareness, knowledge and skills of the staff in DEI? Will this training be optional or required?

Answer: That will be determined by working with the selected consultant(s).

Question: Do senior leaders currently receive executive coaching?

Answer: No executive coaching is currently being utilized.

Question: How should the actual cost for leadership assessment tools and training materials be included in estimated costs, or is this a cost category that can be determined later based on the findings and the new strategic plan?

Answer: Refer to TAB F, Price Information in the RFP and section A, item #1 of Addendum #1 for guidance.

Question: In the assessment phase, besides employees, what other groups would you want to hear from in surveys or focus groups?

Answer: This can be determined along with the selected consultant(s) at a later date.

23) Performance Measures:

Question: What has the organization learned to date about its DEI success – how will you determine that your DEI efforts have been successful and what are your key success indicators/factors?

Answers: Purpose of a future engagement is to set a baseline. No current data.

24) Question: How is Union County currently tracking key performance indicators in DEI? If tracked, which ones are being measured?

Answer: Purpose of a future engagement is to set a baseline. No current data.

Question: As relates to the consultant's role in providing technical assistance in DEI performance measures to Executive Leadership and Directors, how many staff comprise these 2 groups at what level in the organization?

Answer: The County's Management Team consists of the County Manager, Deputy County Manager, two Assistant County Managers, 29 Directors and 5 Senior level positions.

Question: What recent DEI documentation is available that can be shared either as answers to these questions or upon the start of the engagement?

Answer: The selected company will conduct an assessment to gather applicable information that includes this item as needed.

Question: Does the Union County database and reporting framework provide disaggregated data on relevant DEI measures (recruitment, hiring, promotion, salaries, discipline, termination, etc.) or is the data reported only in aggregated numbers?

Answer: The selected company will conduct an assessment to gather applicable information that includes this item as needed.

25) Question: Will you accept references from government or commercial sources?

Answer: Refer to TAB B, "References".

26) Question: How do you wish for proprietary information to redacted from submitted proposals?

Answer: Refer to Section 7, item 7.1 Terms and Conditions, paragraphs 3, 4, 5, 6 and 7 for guidance.

27) Question: Given some questions currently are remaining about pandemic impacts, what is the expectation regarding face-to-face and/or conducting meetings, interviews, trainings using video conferencing virtually?

Answers: We are flexible on virtual and appropriate in-person engagements. We will work with the selected consultant(s) to identify the appropriate methods.

28) Question: First, the RFP requests inclusion of all costs associated with preparing and undertaking the project. Does the County prefer a flat rate bid for the project or an hourly rate along with a projected number of hours the project will likely require?

Answer: Refer to TAB F, Price Information in the RFP and section A, item #1 of Addendum #1 for guidance.

Question: Also relates to pricing, diversity, equity, and inclusion initiatives often involve the possibility of certain activities that I would offer in the event that the County would desire them. In that case, I would offer separate rates for those activities (e.g., training sessions with different groups). Is the County open to a flat bid and separate pricing for recommended activities that are not explicitly cited in the Scope of Work?

Answer: Information that meets/aligns with the RFP scope applies. Refer to TAB F, Price Information in the RFP and section A, item #1 of Addendum #1 for guidance.

29) Question: Second, I read the RFP as signaling a focus on the Organizational Strengthening area of the strategic plan. Are internal DEI initiatives the only focus of the project, or does the County seek a consultant who will identify community-based DEI needs (e.g., underprivileged groups in Union County who need more equitable access to services)? The latter would impact the scope of the initial needs assessment.

Answer: There is a potential to broaden to community-based DEI needs.

30) Question: Does the County have an aspirant county or set of them that it aspires to have the consultant examine for best practices? Does the County have an aspired deadline for the deliverables associated with the needs assessment and plan (4.2), and the subsequent implementation of the plan (4.3)? Having assisted the County with its climate survey, I would envision senior leadership aspiring, at minimum, to have a DEI strategic plan in place by fourth quarter 2021.

Answer: We will work with the selected consultant(s) to identify a timeline that is appropriate and attainable.

31) Question: Is there a not-to-exceed budget or budget range available?

Answer: Budget information is not available at this time.

32) Question: Page 5 – Section 4.1. What is the current documentation available for review of the culture and current operations?

Answer: The selected company will gather applicable information during the assessment process for this project.

33) Question: Page 6 – Section 4.3. Is there a current strategic plan in place? If so, what current KPIs are tied to DEI?

Answer: Purpose of a future engagement is to set a baseline. No current data.

34) Question: Page 6 – Section 4.3. Should Implementation be included in the budget and the proposed work of the Vendor? Page 6 mentions that the implementation may or may not be managed by the Vendor, however, page 7 – Section 4.4, bullet 3 states, “Implement training”.

Answers: Interested companies may provide a price for implementation as described in the RFP. Section 4.4, bullet 3 applies if a company is selected to implement the training.

35) Question: Page 7 – Section 4.4. By “Assist Human Resources staff with developing an accessible and usable DEI training plan,” is the intended deliverable part of an internal portal that is accessible?

Answer: We will work with the selected consultant(s) to identify the appropriate location for an accessible and usable DEI training plan.

36) Question: What format is the County seeking? (Word/PDF?)

Answer: Word and PDF if applicable.

37) Question: Is accessibility tied to ADA compliance?

Answer: Yes

38) Question: Has a needs assessment been done in the past? If so, is it possible to see the results?

Answer: A needs assessment for this purpose has not been completed.

39) Question: Is there an expected budget? Interested in options to guide or capacity build to protect budget, or Vendor provides full service?

Question: What is the total employee count and each level?

Answer: 1,202 full time employees at this time.

Attachment: Attachment D-Message from County Manager...

END OF ADDENDUM No.1

Attachment D
RFP#2021-071

Message from County Manager, Mark Watson to UC Colleagues (March 2021)

Diversity, Equity and Inclusion are important components of a productive and forward-thinking organization.

The past year presented many challenges and opportunities. These took many of us out of our comfort zones of traditional thinking and practices. It caused us to learn new methods for accomplishing our work, communicating and collaborating with each other. It opened our eyes to a renewed importance of relationships with co-workers, community partners, and businesses.

We learned things about our community that we did not know...or had forgotten. We learned that we can not accomplish even a fraction of what our community needs all by ourselves. It takes all of us working together, with a common interest, in order to have a meaningful community impact. The lessons we are learning and have lived this past year highlight the strength of our organization when it recognizes and values the diversity, equity and inclusion of everyone in Union County.

Based upon the lessons learned, I have recently engaged with the Management Team and our Procurement Department to begin the process to develop and implement a strategic plan regarding Diversity, Equity and Inclusion for our organization. Our Procurement Department has listed the solicitation of proposals from qualified Diversity, Equity and Inclusion consulting teams or a consultant to provide a comprehensive strategic assessment and develop a strategic plan that will guide our management team in developing, planning and implementing a comprehensive strategy to increase diversity, equity and inclusion that will continue to embrace employees through education, training and outreach. This initiative aligns with the strategic objectives adopted by the Board of Commissioners, specifically Community Consensus, Sustainability and Organizational Strengthening with a focus on support for all employees, residents and the local business community.

I believe strongly that we need to better understand our employees perspectives and opinions regarding diversity, equity and inclusion and believe this is an excellent opportunity to begin this important work. Part of this process will include the implementation of a diversity & inclusion committee comprised of employees from all areas of the organization. You will receive further information from our Communications Team in the coming weeks seeking applications from those of you who are interested in participating on the diversity & inclusion committee.