

REQUEST FOR PROPOSALS

Washington Evaluators

Integrating Diversity, Equity & Inclusion into WE's Strategic Planning Process

BACKGROUND & PURPOSE

The mission of the Washington Evaluators (WE), a local affiliate of the American Evaluation Association, is to strengthen the evaluation community in the Washington, DC area. Washington Evaluators serves the evaluation community by advocating for the growth of the evaluation profession and by fostering state-of-the-art knowledge and information sharing about evaluation practice. The organization's current strategic plan, which covers operations from 2017-2020, includes four key strategic goals: strengthening the sustainability of the evaluation community; enhancing evaluation relationships and interactions; supporting individual evaluators' professional development needs; and ensuring strong administration of the organization.

As the organization begins to develop a new strategic plan for 2021-2024, and in light of WE's 2020 commitments to integrating anti-racism into our programming, membership, community engagement, and communication activities, and administration/operations,¹ the WE board wishes to engage a Consultant to solicit membership inputs on strategic priorities and the integration of a DEI lens to inform the organization's 2021-2024 strategic plan.

PROJECT SCOPE

The project will include a launch meeting with board members to clarify expectations and desired outcomes and ensure alignment of the Consultant's work with desired goals. In advance of this meeting, the Consultant should review WE's membership survey results (to be shared) and the existing strategic plan.² After the launch meeting, the Consultant should develop a plan for designing and facilitating two 1-hour online town hall meetings with WE members. The Consultant will be expected to facilitate these town halls to identify strategic priorities and solicit ideas for integrating anti-racism into WE's work moving forward. The Consultant will also provide questions that can be posed in a written call for feedback to members for inputs regarding the strategic plan and DEI considerations. This will allow space for engagement from those who cannot attend the town halls.

Expected services to be provided and deliverables for this consultancy include:

¹ Recently, the WE board released an antiracism statement, *Embodying Antiracism Principles and Practices in Evaluation*, which includes a list of commitments and charts a pathway toward progress. See <https://washingtonevaluators.org/page-1816524>.

² <https://washingtonevaluators.org/resources/Documents/WASHINGTON%20EVALUATORS%20ACTION%20PLAN%202020.pdf>

- A kick-off meeting with WE board members to provide context for the engagement and clarity on any outstanding questions or goals
- A work plan for the consultancy to include timelines and desired outcomes
- Language for communicating with membership regarding the consultancy and its goals/intentions
- Questions for the board to put out to membership as part of a call for written feedback
- Designs facilitator guide for online town hall sessions (to be approved before implementation)
- Facilitation of first town hall event
- Debrief of first town hall with adjustments made to second town hall as needed
- Facilitation of second town hall event
- Analysis of feedback from town halls as well as feedback garnered from call for written inputs
- Development and presentation of report sharing membership feedback on strategic priorities (including but not exclusively focused on ideas for how to integrate DEI more intentionally into WE's work). This report should include membership inputs garnered from the town hall conversations as well as those submitted in writing from membership and should be organized around key areas of work including: programming, membership, community engagement (e.g., Evaluation without Borders and scholarship/student engagement efforts), communications, and administration/operations of WE.

ACTIVITY AND LEVEL OF EFFORT DESCRIPTION TABLE

Task	Activity	Deliverable	Format	Timeline	LOE
Launch	1 hour interactive online meeting with WE board members to review desired outcomes and develop work plan	*	Online	November 18	2.5 hours including prep
	Provide language for WE launch message to membership	*	Email or Word Doc	Due November 20	1 hour
	Submit: - Facilitator guide for town hall sessions. The design for the sessions should reflect our need to gather inputs on the WE strategic plan along with our desire to intentionally integrate DEI in our work	*	Word Documents	Due December 2	No more than 8 hours total
	Integrate feedback from WE board members into final facilitator guide	*	Word Document	Due December 11	2 hours

Town Hall Meetings	Facilitate 2 one-hour town hall meetings with WE members ³	*	Online	December 2020/ January 2021	6 hours total for all meetings, including signing on 15 minutes early, running the session, staying on for debrief and integrating changes from session 1 into session 2
Key Informant Interviews	Facilitate 5 short (20 mins) interviews with five non-WE members (names and contact information will be provided).	*	Online	December 2020/January 2021	3.5 hours total for all interview preparation and interviews.
Analysis of membership ideas	Summarize feedback from town hall meetings			January 2021	2 hours
	Summarize feedback from written responses received from call for comments to membership writ large			January 2021	1 hour
	Develop a brief report to share feedback and recommendations related to primary areas of work: programming, membership, community engagement, and administration	*	Email Word document	Due January 18, 2021	4 hours
	Preparation and 1 hour meeting with WE board to present recommendations	*	Online	January 20, 2021	2 hours including prep

³ WE shall provide the Zoom platform for town halls and at least one volunteer to provide technical support.

Total estimated level of effort: 32 hours

ANTICIPATED ADMINISTRATIVE TIMELINE

- October 22: RFP published
- November 2: Proposals due by 5pm
- November 10: Consultant selected
- November 13: Consultancy begins
- January 31, 2021: All deliverables submitted

Contract Terms

Ownership of Data/Materials. Washington Evaluators shall own all data gathered by the Consultant and all materials produced by the Consultant in connection with this contract. The Consultant may not use such information for any purposes other than to perform its obligations under this Contract.

Nondisclosure of Confidential Information. The term “Confidential Information” shall mean all non-public information that WE designates as being confidential, or which, under the circumstances of disclosure ought to be treated as confidential. The Consultant shall, with respect to Confidential Information of Washington Evaluators shall during and after the contract term: (1) to take reasonable security precautions, at least as great as the precautions it takes to protect WE’s confidential information, but no less than reasonable care, to keep the Confidential Information confidential, (2) not to disclose Confidential Information to any third party, (3) not to make any use, disclosure or dissemination whatsoever of the Confidential Information except in connection with, and as permitted by, this Contract, (4) not to modify, reverse engineer, decompile, disassemble, or create derivative or other works based upon, containing or otherwise relating to Confidential Information, except as expressly permitted by this Contract. Upon termination of this Contract, the Consultant shall destroy or return all Confidential Information received from WE or collected during the contract term. The Consultant agrees that it will not retain any copy, summary or extract of the Confidential Information or any related work papers on any storage medium.

CONSULTANT QUALIFICATIONS

Qualified candidates will:

- Be expert in designing and facilitating interactive and participatory online meetings using Zoom (or equivalent) technology
- Have experience with strategic planning at the organizational level
- Have expert knowledge in DEI theories, practices, and standards and experience applying this knowledge in a professional setting

People of color, LGBTQ individuals, people with disabilities, and people with other marginalized identities are strongly encouraged to apply.

Due to the virtual nature of this scope of work, we will consider qualified candidates living anywhere in the US. Travel to the Washington, DC area is not required. WE membership is not required for this contract.

Proposals will not be accepted from WE board, committee, and task force members, their immediate family members, and their places of employment or businesses.

PROPOSAL SUBMISSION

- 2-3-page proposal describing 1) qualifications/experience supporting non-profits on DEI and strategic planning and designing and facilitating interactive and participatory online meetings, 2) your approach,* and 3) proposed work plan with timeline and desired outcomes
- CV/resume and 3 professional references
- Budget proposal with cost details

** Consultants may propose alternative strategies other than what is proposed in the Project Scope to accomplish the project goal of soliciting membership inputs on strategic priorities and the integration of a DEI lens into WE's 2021-2024 strategic plan.*

Proposals should be submitted by 5pm ET on November 2, 2020 to communityengagement@washingtonevaluators.org, cc: president@washingtonevaluators.org and presidentelect@washingtonevaluators.org. Subject line should indicate "RFP - DEI Consultancy - [Your Name]". Finalists may be asked to participate in a short interview with a small group of WE board members prior to award.

APPLICATION EVALUATION CRITERIA (in order of priority)

- Qualifications/experience
- Cost competitiveness
- Familiarity with Washington Evaluators and understanding of the field of evaluation