

REQUEST FOR PROPOSALS

For

Diversity, Equity and Inclusion Training Services

issued by

COMMUNITY BEHAVIORAL HEALTH

Date of Issue:
January 7, 2022

Applications must be received no later than
2:00 P.M. on January 31, 2022

All questions related to this RFP should be submitted via e-mail

to Hans Leach at hans.leach@phila.gov

**EQUAL OPPORTUNITY / AFFIRMATIVE ACTION EMPLOYER – WOMEN,
MINORITY INDIVIDUALS AND PEOPLE WITH DISABILITIES ARE
ENCOURAGED TO RESPOND**

Table of Contents	Page Number
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1. Project Overview	4
1.1. Introduction/Statement of Purpose	4
1.2. Project Background.....	4
1.3. Request for Proposals	4
1.4. General Disclaimer	4
2. Scope of Work	4
2.1. Project Details	4
2.2. Services to be Provided/Required Tasks.....	5
2.3. Monitoring	6
2.4. Reporting Requirements	6
2.5. Compensation/Reimbursement	6
2.6. Organization and Personnel Requirements	6
2.7. Technological Capabilities.....	7
3. Proposal Format, Content, and Submission Requirements; Selection Process	7
3.1. A. Required Proposal Format	7
3.1.1. Format Structure	7
3.1.1.1. Proposal Cover Sheet.....	7
3.1.1.2. Table of Contents.....	7
3.1.1.3. Format Requirements.....	7
3.1.2. Proposal Content.....	8
3.1.2.1. Applicant Profile/Statement of Qualification/Relevant Experience	8
3.1.2.2. Project Understanding and Proposed Scope of Work.....	8
3.1.2.3. Personnel.....	8
3.1.2.4. References.....	8
3.1.2.5. Project Plan and Timeline	9
3.1.2.6. Cost Proposal	9
3.1.2.7. Operational Documentation and Requirements	9
3.2. Selection Process	10
3.2.1. Threshold Requirements	10
3.2.2. Scoring by Review Committee	10
3.2.2.1. Technical Demonstrations	11
3.2.3. MBE-/WBE-/DSBE-owned and Local Businesses	11
4. Proposal Administration	11

4.1. Procurement Schedule	11
4.2. Questions Relating to the RFP.....	12
4.3. Interviews/Presentations	12

1. Project Overview

1.1. Introduction/Statement of Purpose

Community Behavioral Health (CBH) is issuing this Request for Proposals (RFP) to contract with a qualified, independent vendor who specializes in Diversity, Equity, and Inclusion (DEI) Business Strategy, Consultation and Training Services. It is the intent of this RFP to solicit proposals from all interested vendors possessing expertise in building DEI infrastructure and training agencies like CBH in matters of diversity, equity, inclusion, belonging and cultural competency in the workplace within the guidelines established in this RFP. The CBH Office of Diversity, Equity, and Inclusion will be managing the contract.

1.2. Project Background

The purpose of this RFP is to solicit proposals from interested vendors with documented expertise in creating and conducting a broad array of business, analytical and training services within diversity, equity, inclusion and belonging. All the requirements are specified in the scope of work section of this RFP (2.2., Services to be Provided/Required Tasks).

A key area of focus allows for the understanding that the Commonwealth of Pennsylvania HealthChoices Program requires CBH to provide cultural competency training to all employees to help them better understand how culture plays a role in a person's behavior and interaction. This requirement must be seamlessly integrated into the core training services.

1.3. Request for Proposals

CBH anticipates selecting one vendor to provide all the services specified in this RFP.

1.4. General Disclaimer

This RFP does not commit CBH to award a contract. This RFP and the process it describes are proprietary and are for the sole and exclusive benefit of CBH. No other party, including any Applicant, is intended to be granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of CBH and may be subject to public disclosure by CBH.

2. Scope of Work

2.1. Project Details

The overall objective of this RFP is to identify a qualified vendor who can develop and administer the below-detailed cultural competency, diversity, and inclusion courses, can conduct measured quantitative and qualitative analysis (organizational climate survey) by using statistically backed systems and appropriate methodology, and who can use innovative technology tools to create a DEI user-friendly framework for CBH staff.

2.2. Services to be Provided/Required Tasks

More specifically, CBH is seeking a vendor to provide the following services/project deliverables:

- Create and curate tailored training topics/sessions to provide foundational information on the importance of understanding culture and how culture impacts a person's perspective on life and their behavior (Cultural Competency). This Cultural Competency training should provide individuals who are from different backgrounds the tools to empathize with each other and will be the foundation to the program.
- Facilitate additional suite of DEI related training sessions and/or workshops to new hire employees during minimum of six on-site sessions (synchronous format) held three times during the year, roughly April/May 2022, July/August 2022, and October/November 2022. Training platform will offer flexibility for sessions via synchronous and asynchronous modes of learning.
- Provide, at minimum, bi-monthly on-site support to C-Suite, Executive staff and workforce in the form of listening sessions, town halls, training workshops, and other dynamic delivery models.
- Create and develop CBH DEI workshop series. Workshops should offer additional scope of increased complexity for equipping workforce with action-oriented models for systemic change. Curriculum should incorporate social justice pedagogy and empowerment-based models to closely align with issues and concerns specific to Philadelphian-based workforce.
- Provide asynchronous learning platform for trainings and workshops delivered throughout the year, beginning in Spring 2022.
- Further education, training, and analytical feedback:
 - Propose additional course topics that address the City of Philadelphia's diversity and poverty challenges.
 - Facilitate the additional courses, as identified, during various periods throughout the year.
- Develop an innovative, technology-driven DEI portal or other agreed-upon delivery platform that will serve as a platform for resources, reference information, staff engagement and communication tools, and a variety of learning and development tools, to be housed by/within CBH. (See Attachment F: Attestation of Qualifications).
- Create a marketing plan that supports integration throughout the organization.
- Design framework for culture and celebratory events that foster: *Diversity, Equity, Inclusion, and Belonging*.
- Provide direction and collaboration on erecting Employee Resource Groups.
- Create approach for developing short and long-term evaluation process, metrics and report card designed for all organizational levels.
- Develop organizational climate survey tool to assess organizational strengths and challenge areas. Survey tool should be complex in design and include both quantitative and qualitative-based development methods. Analytic reports should offer multiple views to appropriately engage various audiences throughout the organization. Methodology should account for statistically significant findings while also allowing for various modes of identification for outliers and anecdotal information.

- Provide regular consultation and support to varying levels of the organization, as needed. Additional targets should include review, analysis and action plan for: DEI-focused Talent Acquisition processes (recruitment, hiring), employee incentives programs, retention, and disciplinary processes (HR), business strategy development (C-Suite), communications (Public Affairs), community impact (Member Services), administrative process (Operations) and cultural fluency throughout the provider network (Provider Operations).
- Provide insight and knowledge of DEI best practices in the field with particular focus on non-profit, healthcare entities.
- Develop framework and shared language for both internal and external communications that enhances the organization's mission, operations, and strategic direction.
- Develop recommendations for various stages of strategy mapping through the organization's four DEI roadmap stages: *Listening, Learning, Leading* and *Sustaining*.

2.3. Monitoring

The CBH Office of Diversity, Equity and Inclusion will be managing the contract. An individual from that unit will be identified as the point person for the work to be conducted under the contract that is developed through this RFP and will monitor those activities for the duration of the contract.

2.4. Reporting Requirements

Written progress reports will be required on a mutually agreed upon, periodic basis to document the progress of the work to be performed but will be no less frequent than monthly. In addition, CBH may request additional reports over the course of the contract.

2.5. Compensation/Reimbursement

A cost proposal must be provided based upon your best understanding of the scope of the project and the services to be delivered. This should be presented as the total cost, itemized by each phase of the project (i.e., expected project deliverables detailed in Section 2.2.), and further by a detailed list of charges for services, including hourly personnel rates for all staff assigned to this project, subcontractor fees, reimbursable expenses, and other miscellaneous costs and fees. Services for the proposed project will be reimbursed as they are incurred through submission of invoices to CBH.

While CBH may award a contract based on the initial offer, an Applicant should make its initial offer on the most favorable terms available. CBH reserves the right, however, to have discussions with those potential consultants falling within a competitive range and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

2.6. Organization and Personnel Requirements

CBH is seeking a vendor with the requisite skills and abilities to perform the work being sought through this RFP. The selected vendor must have been in operation for a minimum of two years by signing of contract and at no less than twenty-five years of combined professional staff experience creating, designing, and administering diversity and inclusion trainings and infrastructure of this type, or related work. Additionally, vendor must be proficient and operate at

a high level with access to survey data collection tools and innovative programs for organizational survey design. Applicants should include any credentials from any certifying organization that attest to the capabilities of the organization or of any of the individuals employed by the organization that will be working on the proposed project.

2.7. Technological Capabilities

Applicants must have the technological capabilities required to perform the proposed activities in this RFP, including the expertise, technical design capabilities, and staff who can execute DEI portal or other agreed-upon delivery platform discussed in Section 2.2 Services to be Provided/Required Tasks.

3. Proposal Format, Content, and Submission Requirements; Selection Process

3.1. A. Required Proposal Format

3.1.1. Format Structure

3.1.1.1. Proposal Cover Sheet

The cover sheet (see Attachment A) should be completed with the Applicant's information and included as the first page of the proposal.

3.1.1.2. Table of Contents

A table of contents should be included as the second page of the proposal with each section of the proposal included and with a page number for the first page of each section.

3.1.1.3. Format Requirements

Proposals must be prepared simply and economically, providing a straightforward, concise description of the Applicant's ability to meet the requirements of the RFP. Each proposal must provide all the information detailed in this RFP using the format described below. The narrative portion of the proposal must be presented in print size of 12, using Times New Roman font, single spaced on 8.5" by 11" sheets of paper with minimum margins of 1". For each section where it is required, the Applicant must fully answer all the listed questions in the outline form in which they are presented in the RFP. Answers to each question must be numbered/lettered and correspond to the numbered/lettered questions in this RFP. Failure to number and letter the questions or to respond to all questions may result in the proposal's being considered non-responsive. Each attachment, appendix, or addendum must reference the corresponding section or subsection number.

Applicants are required to limit their narrative responses to 10 single-spaced pages. This page limit includes sections 3.1.2.1. to 3.1.2.5. below. There are no limitations for the cost proposal and organizational requirements, sections 3.1.2.6 and 3.1.2.7. If you have responded to a requirement in another part of your proposal, refer to that section and do

not repeat your response. Applicants whose narrative exceeds 10 single-spaced pages may have their proposals considered non-responsive and be disqualified.

3.1.2. Proposal Content

The proposal should follow the format below. Information should be complete and demonstrate that the consultant can perform the required work in a professional manner.

3.1.2.1. Applicant Profile/Statement of Qualification/Relevant Experience

Provide company contact information, including how long you have been in business and the specific services you provide. Please provide a brief narrative description of the purpose, corporate status (profit or non-profit), and organizational structure of the company. Organizational charts may be used to support appropriate aspects of this narrative and may be included as an attachment to your proposal. Identify and briefly describe related work completed in the last three years. Describe only work related to the proposed effort and include any examples of similar work in governmental, non-profit, or human services related organizations. Include evidence of satisfactory and timely completion of similar work performed for past projects.

3.1.2.2. Project Understanding and Proposed Scope of Work

Prepare a brief introduction including a general demonstration of your understanding of the scope and complexity of the required work. Provide a description of how the proposed services will be provided. Please include a description of each item identified in the scope of work section (Section 2.2.) and describe creative solutions and alternative approaches where feasible. Please describe how you would prefer work be developed, shared, mutually agreed upon, and assessed by CBH.

3.1.2.3. Personnel

Identify key personnel who will be assigned to this project. Detail their experience in work related to the proposed assignment. Specify the Project Manager who will serve as a contact person. Provide resumes and job descriptions for Proprietors and DEI practitioners who will be involved in the management of all projects. Provide copies of certifications of any individual whose job description requires a certification. In this section, also state the intention, if that is the case, to utilize subcontractors to perform any of the work for this project. For each subcontractor, provide the name and address of the subcontractor, a description of the work the subcontractor will provide, and whether the subcontractor will assist in fulfilling the goals for inclusion of minority, woman, or disabled owned businesses.

3.1.2.4. References

Please include references with contact information from at least three organizations that have used your organization's services in the past three years and have been customers for a minimum of 9 months.

3.1.2.5. Project Plan and Timeline

Provide a description of the project plan and timeline for providing diversity and inclusion training development and delivery, and related services being sought through this RFP. Please note that the desired training timeframes are discussed in Section 2.2. Services to be Provided/Required Tasks.

3.1.2.6. Cost Proposal

Please provide a cost proposal based upon your best understanding of the scope of the project and the services to be delivered. This cost proposal should include the total estimated cost for this project, itemized by the expected project deliverables detailed in section 2.2. This cost proposal should also include the provision of a detailed list of charges for services. The list of services should include, but not be limited to:

- a. Hourly personnel rates for all staff assigned to this project
- b. Fees for subcontractors
- c. Reimbursable rates for expenses such as printing, copies, etc.
- d. Other miscellaneous costs and fees

Final rates will be determined in negotiations with the qualified Applicant after the proposal submissions have been reviewed and contract negotiations have begun. Although CBH may begin contract negotiations based on the submitted proposal, CBH reserves the right to have discussions with those Applicant(s) falling within a competitive range and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

3.1.2.7. Operational Documentation and Requirements

Please make sure to include completed and signed (where applicable) attachments with your submission:

- Attachment A: CBH Administrative RFP Response Cover Sheet
- Attachment B: City of Philadelphia Tax and Regulatory Status and Clearance Statement
- Attachment C: City of Philadelphia Disclosure Forms (forms attached separately as a .pdf)
- Attachment D: City of Philadelphia Disclosure of Litigation form
- Attachment E: Acknowledgement of CBH Administrative Procurement Terms and Conditions
- Attachment F: Attestation of Technical Qualifications

Additionally, in this section, please include the following information, either within the section itself or by reference to an attachment to your proposal. If not applicable, please indicate "N/A":

- Tax Identification Number
- Letter attesting that all required federal, state, and local taxes (including payroll taxes) for the past 12 months have been paid
- In the case of for-profit organizations, group or individual practices, disclosure of any person or entity holding any shared ownership or controlling interest of 5% or more.
- MBE/WBE/DSBE Status – For-profit Applicants

3.2. Selection Process

An application review committee will review all responses to this RFP. Based on the criteria detailed below, the committee will make recommendations concerning the submissions that are best able to meet the goals of the RFP.

Submissions will be reviewed based upon the merits of the written response to the RFP.

Specific scoring criteria upon which the review will be based include:

3.2.1. Threshold Requirements

Threshold requirements provide a baseline for all proposals, which means they provide basic information that all Applicants must meet. Failure to meet all the requirements may disqualify an Applicant from consideration through this RFP. Threshold requirements include timely submission of a complete application with all sections outlined in Section 3.1. completed. Threshold requirements include having the requisite experience and qualifications to implement the program and being a vendor in good standing with the City and CBH.

Threshold requirements also include consideration of the Applicant’s financial status, including any potential delinquencies to the City and CBH. Proposals may be rejected, if, in CBH’s judgment, the Applicant has failed to provide all information required by this RFP; has been delinquent or unfaithful in the performance of any contract with CBH or others; is delinquent and has not made arrangements satisfactory to CBH with respect to the payment of City taxes or taxes collected by the City, or other indebtedness owed to the City or other taxing authorities; is not in compliance with regulatory codes applicable to Applicant; is financially or technically incapable; or is otherwise not a responsible Applicant.

CBH reserves the right to conduct investigations with respect to financial, technical, and other qualifications, and references without notice to the Applicant.

3.2.2. Scoring by Review Committee

Applicants that do not meet all the threshold requirements may have their proposals disqualified. For Applicants meeting the threshold requirements, the scoring criteria for this RFP upon which the review will be based are as follows:

- Demonstrated qualifications and relevant experience **(25 pts.)**

- Demonstrated understanding of the project as indicated by a description of each item in the scope of work section **(25 pts.)**
- Appropriateness of project approach and effectiveness of proposed project plan and timetable **(25 pts.)**
- Appropriateness of staffing to complete the project **(10 pts.)**
- As stated in the cost proposal section, likelihood that the proposal will provide the best value compared to other submitted proposals **(15 pts.)**

3.2.2.1. Technical Demonstrations

Applicants that meet all threshold requirements will also be required to record and submit a technical demonstration that complements their written proposal. The demonstration will be factored into the Applicant’s overall score. Applicants meeting threshold requirements will be notified after this threshold review, and further guidance will be provided at that time.

3.2.3. MBE-/WBE-/DSBE-owned and Local Businesses

Special consideration will be given for the following:

- Businesses owned and controlled by minorities, women, and disabled persons
- Philadelphia based Applicants

4. Proposal Administration

4.1. Procurement Schedule

The anticipated procurement schedule is as follows:

RFP Event	Deadline Date
RFP Issued	January 7, 2022
Deadline to Submit Questions	January 14, 2022
Answers to Questions on Website	January 21, 2022
Application Submission Deadline	January 31, 2022 by 2:00 PM EST
Applicants Identified for Contract Negotiations	February 17, 2022

CBH reserves the right to modify the schedule as circumstances warrant.

This RFP is issued on January 7, 2022. In order to be considered for selection, all applications must be delivered to the below e-mail address no later than 2:00 PM on January 31, 2022.

- Application e-mails should be titled “**Diversity, Equity and Inclusion Services RFP**”. Applications submitted by any means other than submission to the e-mail below will not be accepted.

- Applicants must submit an electronic version of the application prepared as a PDF document – please e-mail to hans.leach@phila.gov.
- Applications submitted after the deadline date and time will be returned.
- The individual Applicant or an official of the submitting agency, authorized to bind the agency to all provisions noted in the application, must sign the cover sheet of the application (See Attachment A).

4.2. Questions Relating to the RFP

All questions concerning this RFP must be submitted in writing via email to Hans Leach at hans.leach@phila.gov by January 14, 2022. CBH will respond to questions it considers appropriate to the RFP and of interest to all Applicants, but reserves the right, in its discretion, not to respond to any question. Responses will be posted on the CBH website by January 21, 2022. Responses posted on this website become part of the RFP upon posting. CBH reserves the right, in its discretion, to revise responses to questions after posting by posting the modified response. No oral response to any Applicant question by any CBH employee or agent shall be binding on CBH or in any way considered to be a commitment by CBH. **Contact regarding this RFP with CBH or related staff other than the individual named above is not permitted and failure to comply with this restriction could result in disqualification.**

4.3. Interviews/Presentations

Applicants may be required to make an oral presentation concerning various aspects of their application to CBH. Such presentations provide an opportunity for Applicants to clarify their application to ensure a thorough and mutual understanding. CBH will schedule such presentations on an as-needed basis.