



**PROSPER**  
PORTLAND

Building an Equitable Economy

## **REQUEST FOR PROPOSALS 19-01**

### **EQUITY PRACTITIONER ADVISORY GROUP**

**Proposals Due: August 29, 2019**  
by 2:00 PM (Pacific)

A voluntary pre-proposal meeting for this RFP will be held on  
**August 13, 2019 at 9:30 am** at Prosper Portland offices (see Section 1.5 of this RFP)

**Prosper Portland's SOLE POINT OF CONTACT for this RFP:**

Kristy Branson  
Senior Procurement Specialist  
Prosper Portland  
222 NW Fifth Avenue  
Portland, Oregon 97209

503.823.3688

[bransonk@prosperportland.us](mailto:bransonk@prosperportland.us) (email)  
<http://www.prosperportland.us> (www)

*Prosper Portland highly encourages the participation of certified minority-owned, women-owned, disadvantaged, and emerging small businesses in this contract opportunity.*

## 1.0 REQUEST FOR PROPOSALS SUMMARY AND SCHEDULE

### 1.1 REQUEST FOR PROPOSALS DATA AND CONTACT INFORMATION

Request for Proposals Title: **Equity Practitioner Advisory Group**

Solicitation Number: **RFP 19-01**

Solicitation Coordinator: **Kristy Branson, Senior Procurement Specialist**

Contact Information: **503.823.3688 (office)**

[bransonk@prosperportland.us](mailto:bransonk@prosperportland.us) (email)

Proposal Delivery Location: **See Section 4.1**

### 1.2 SUMMARY

The goal of this Request for Proposals is to partner with Equity Practitioners (“Practitioner(s)”) to support Prosper Portland, the assumed business name of the Portland Development Commission, the redevelopment and urban renewal agency of the City of Portland, in clarifying some deep moral questions that should not be answered in a silo at Prosper Portland, but rather, vetted with the support of a community of experts. Prosper Portland intends to award multiple contracts from this RFP.

This RFP refers to the guidance on Key Topics and recommended toolkit as the “Scope A” work. Documentation of the Key Topic recommendations and development of the toolkit is called the “Scope B” work in this RFP.

### 1.3 PRE-PROPOSAL MEETING

A voluntary pre-proposal meeting for this RFP will be held on **August 13, 2018 at 9:30 am** (Pacific Time) at Prosper Portland offices at **222 NW 5th Avenue, Portland, Oregon** in the **first-floor, Commission Conference Room**. Attendance at this meeting is recommended but not required. This RFP, the Project and Prosper Portland’s procurement process and contract requirements will be explained at the pre-proposal meeting.

### 1.4 SCHEDULE OF SOLICITATION and CONTRACT AWARD EVENTS

Prosper Portland reserves the right to change this schedule for any reason.

Solicitation or Contract Award Event	Date
Request for Proposals Issued	August 6, 2019
Pre-Proposal Meeting	August 13, 2019
Proposal Barriers or Questions. Submit any barriers to you proposing on this project, all questions or requests to change anything in this RFP in writing to the RFP Coordinator	August 15, 2019
<b>PROPOSAL FORM DUE DATE AND TIME (no later than)</b>	<b>AUGUST 29, 2019 by 2:00 PM (Pacific Time)</b>
Notice of Contract Award ( <i>anticipated</i> )	September 16, 2019
Contract Effective Date ( <i>anticipated</i> )	September 30, 2019

## 2.0 PROSPER PORTLAND AND PROJECT BACKGROUND

### 2.1 ABOUT PROSPER PORTLAND

Created by Portland voters in 1958, Prosper Portland is the economic and urban development agency for the city of Portland. We focus on building an equitable economy by carrying out a comprehensive range of economic development programs that supports small businesses, improves access to workforce training, and creates jobs for Portland residents. We work with partners to drive public attention and resources to different areas of the city which helps Portland realize capital projects – parks, streetscape improvements, community centers – that would not happen on their own, making the city a better place to live for all Portlanders.

View our website at <http://www.prosperportland.us>

### 2.2 ABOUT THE PROJECT

Prosper Portland is implementing programming to encourage businesses to engage in culture change work related to racial equity. Examples of these programs include:

- **Portland Means Progress Initiative:** Businesses voluntarily commit to take action on a variety of options that contribute to communities of color. One action is to engage in organizational culture change. This program acts as a gateway to other Prosper Portland programming and existing resources.
- **Enterprise Zone Program:** A tax incentive program where businesses receive tax abatement on capital investment by committing to take action from a menu of options that includes racial equity initiatives.
- **Loan Products:** A pilot loan program that will incentivize companies to create a diversity plan, recruit and retain employees of color and other activities that will effectively create a financial reward for doing so.
- **Inspiring Diversity Grant:** A grant program that provides resources to traded-sector companies to have the funds to work with an equity practitioner.
- **TechTown Diversity Pledge:** A business pledge of tech companies committing to take collective action to address the underrepresentation of women and communities of color in the tech industry.

Prosper Portland is seeking a small group of Practitioners who will act as thought partners in developing tools and clarification to support businesses on their equity journeys (the “Project”). The Project seeks to engage with leaders from the Portland equity practitioner community who have experience working with different size businesses and who have a diversity in various models and theories of change. Through the course of the Project, the Practitioners will support Prosper Portland in discovering answers and recommendations by collective diverse perspectives.

There are many approaches to fostering successful organizational culture change. Prosper Portland wants to engage very thoughtfully in all elements to encourage and verify that quality work is taking place but does not dictate a specific strategy for each business. Given Portland’s wide variety of companies, resources, trainers, and thought partners, success in culture change and racial equity will take a variety of forms.

The focus of the approach is aimed at training employees on Diversity, Equity, and Inclusion and the other ways businesses can center a racial equity strategy in workplace culture.

## 3.0 STATEMENT OF WORK

This section describes, at a minimum, Prosper Portland’s expectations of the successful Proposers (the “Practitioner”) under the contracts awarded from this RFP.

### 3.1 SCOPE OF SERVICES FOR “SCOPE A”

Prosper Portland will partner with up to four (4) Practitioners to provide guidance on Key Topics and develop a recommended toolkit for use across Prosper Portland programming and to support businesses to engage in culture change work. We are not seeking prescriptive “how-to’s” to these questions, but rather protocols to support us in making decisions moving forward.

#### 3.1.1 Key Topics Requiring Guidance:

- a) How can we encourage culture change in business that should be done out of a moral imperative?
- b) How can we resource small businesses so they can stay competitive and engage in culture change work?
- c) What questions can we ask to validate if equity work is driving intended culture change at an organization? How can we measure a company’s progress in equity-related work? How do we measure this progress when action is tied to financial incentives?
- d) Should a business be removed from Prosper Portland programming (i.e. Portland Means Progress) if it is known to have a severe level of bias, cultural appropriation, or lack of investment into racial equity work? How would this be determined?
- e) How do we connect the private sector to equity practitioners without endorsing a model for change? If a directory of equity practitioners is created, how would practitioners be vetted?
- f) What does a business that does this right look like?
- g) How can we provide resources and access to information for the private sector to do culture change work without creating a wave of unintended harm if the businesses culture change process is not quality?

#### 3.1.2 Suggested Toolkit Components:

This toolkit is intended to support businesses on their equity journeys and be flexible in supporting businesses across industry, size, and how advanced they are in equity work. The goal of the toolkit is to provide resources for businesses to be successful in their diversity, equity, and inclusion (DEI) work, without promoting one right way to do this work, and while maintaining that the businesses themselves must retain ownership of their culture change work.

Components of the toolkit may include:

- a) Readiness Assessment
- b) Local equity practitioner directory with a process for maintaining the directory
- c) Example industry standards and key questions for sourcing equity practitioners
- d) Definitions of key terms

- e) Narrative and data on how equity work impacts business
- f) Suggested training curriculum / topics of discussion
- g) Risks / Benefits of culture change work
- h) Journey from Racist to Anti-Racist Organization\*
  - Potential approaches
  - Case studies
  - How-to's for difficult situations
  - Best practices
  - Actions along the way
- i) How to scale equity work within an organization
- j) Tips on engaging internal champions for this work
- k) Metrics and Measurement for businesses to track progress

\* Under its [policy on Social Equity](#), Prosper Portland defines an Antiracist Organization as one that: “(1) has restructured all aspects of institutional life to ensure full participation of People of Color, including their worldview, culture and lifestyles; (2) implements structures, policies and practices with inclusive decision-making and other forms of power-sharing on all levels of the institution’s life and work; and (3) commits to struggle to dismantle racism in the wider community, and builds clear lines of accountability to racially oppressed communities.”

Please also visit <https://portlandmeansprogress.com/training> for a starter guide of what we are developing more extensively through the Project.

**3.2 SCOPE OF SERVICES FOR “SCOPE B”**

To advance the Scope A work, Prosper Portland may further engage with one of the Practitioners to document the recommendations from the group of equity practitioners and develop the Toolkit itself.

**3.3 DELIVERABLES AND PROJECT SCHEDULE**

The following schedule is tentative and subject to further review and revision. Proposers should use the schedule as a framework when considering the work required by this RFP and the Scope B work.

Scope A (Key Topics and Toolkit Recommendations)		
Deliverable	Description (type and duration of anticipated meetings)	Timeline
1. Group Meetings	<ul style="list-style-type: none"> <li>- Initial Equity Practitioner group meeting (4 hours)</li> <li>- Mid-Project Meeting (4 hours)</li> <li>- Equity Practitioner Two-Day Work Session (16 hours)</li> <li>- Remote Equity Practitioner Meetings (ongoing throughout project / following Two-Day Work Session) – (6 hours)</li> <li>- Final Work Session (4 hours)</li> <li>- These meetings are to be used to reach consensus as a group</li> </ul>	Initial Meeting: Thursday, October 3, 2019 Mid-Project Meeting: Thursday, October 24, 2019 Two-Day Work Session: November 18 & 19, 2019 Final Work Session: December 12, 2019 Remote Meetings: Ongoing through Oct-Dec 20 2019

2. Business Engagement	Engage with four (4) businesses for feedback on toolkit development. Engagement must be diverse both in identity and position in company. This activity includes scheduling meetings, compiling notes from meetings, and following up with business contacts. Note: Prosper Portland will provide businesses.	October 4, 2019 - November 15, 2019
3. Documentation & Recommendations	<ul style="list-style-type: none"> <li>- Compile notes from meetings, document recommendations and submit to Prosper Portland</li> <li>- Document recommendations to: <ul style="list-style-type: none"> <li>o key questions outlined in Section 3.1.1</li> <li>o creation of toolkit with minimum components outlined in Section 3.1.2</li> </ul> </li> </ul>	ongoing

<b>Scope B (Documentation and Toolkit Development)</b>		
<b>Deliverable</b>	<b>Description</b> (type and duration of anticipated meetings)	<b>Timeline</b>
1. Summary Report with Proposed Toolkit	Summary report provided to Prosper Portland to include: <ul style="list-style-type: none"> <li>- documented responses and recommendations to all key questions provided in the RFP, as refined in the initial group meeting</li> <li>- documented proposed toolkit</li> </ul>	Summary Report to be submitted to Prosper Portland by December 13, 2019. Prosper Portland will provide comments, and final Summary Report will be provided, with comments addressed, by January 24, 2020
2. Presentation	<ul style="list-style-type: none"> <li>- Develop presentation materials and provide these to Prosper Portland for review by January 24, 2020.</li> <li>- Deliver a 1.5 hour presentation (30 minute presentation with time for Q&amp;A) to key project stakeholders in partnership with Prosper Portland in February 2020.</li> </ul>	Presentation Materials: January 24, 2020 Deliver Presentation: February 2020

## 4.0 SUBMITTAL AND EVALUATION

### 4.1 PROPOSAL REQUIREMENTS

To be considered for a contract, submit the attached Proposal Form to the RFP Coordinator named above no later than the proposal deadline by either:

1. Email to [bransonk@prosperportland.us](mailto:bransonk@prosperportland.us) in PDF format not exceeding five megabytes (5 MB); or,
2. Deliver in-person or by mail in a sealed envelope addressed to:  
Prosper Portland  
Attn: Kristy Branson  
RFP 19-01  
222 NW 5<sup>th</sup> Avenue  
Portland, OR 97209

### 4.2 EVALUATION PROCESS

Prosper Portland will review all submissions and intends to award up to four (4) contracts from this RFP. Proposals will be scored on a 1-10 rating scale. For this Project, Prosper Portland seeks to partner with equity practitioners that share our commitment to advancing racial and social equity in Portland. Criteria used in evaluating submissions will include the thoughtfulness in response to the questions posed in the attached Proposal Form.

The ideal proposer will have experience developing tools and processes for business to expand their DEI journey, are collaborative problem-solvers, bring requisite skills to the table, and can meet the timeline listed above. Prosper Portland is seeking a diversity of experience and specialty in the equity practitioner group and reserves the right to select the Practitioners that, taken as a whole, bring the most complementary make-up of skills and specialties (e.g., training, strategy, working with small businesses, large businesses, etc.).

## 5.0 CONTRACT REQUIREMENTS

### 5.1 FORM OF AGREEMENT

The Proposers selected from this RFP (the “Practitioner(s)”) will be invited to enter into a Purchase Order for Services with Prosper Portland (the “PO”). The PO will become effective upon execution by both parties; commencement of work will be ordered upon Prosper Portland’s issuance of a Notice to Proceed to each Practitioner.

### 5.2 CONTRACT TERMS AND CONDITIONS

The terms and conditions that will govern the PO can be found on Prosper Portland’s website [at this location](#).<sup>1</sup> **Proposers who propose changes to any term or condition must include their proposed changes in their proposal.** Prosper Portland is under no obligation to accept any such proposed changes.

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<sup>1</sup> <https://prosperportland.us/wp-content/uploads/2016/07/PO-Terms-2014-07-18.pdf>

### 5.3 COMPENSATION AND PAYMENT TERMS

- 5.3.1 **Consulting Fees for the Scope A Work.** Prosper Portland intends to pay the selected Practitioners a flat fee of \$7,200 each for completion of all “Scope A” activities, meetings, and work products listed in Section 3.1 and 3.3 above. This amount is payable in three (3) monthly installments of \$2,400 per month. Prosper Portland will pay a prorated amount if any Practitioner is unable to complete the expected scope of work.
- 5.3.2 **Consulting Fees for the Scope B Work.** Prosper Portland reserves the right to negotiate Consulting fees for the Scope B services during with one of the Selected Practitioners.
- 5.3.3 **Prosper Portland Payment Terms.** NET 30 DAYS from the date of all properly prepared invoices.

### 5.4 CONTRACT TERM

The initial term of the Scope A PO will be for a period of approximately four (4) months which may be extended upon the mutual written agreement between the parties to that contract. The duration of the Scope B PO, if awarded, will be for a period of approximately two (2) months which may be extended upon the mutual written agreement between the parties to that contract.

### 5.5 CONTRACT COMPLIANCE

Consultant must comply with the following before Prosper Portland will execute the Contract with that firm:

- 5.5.1 **Authority to Transact in Business in Oregon.** Be a legal entity that has the authority to transact business in the state of Oregon.
- 5.5.2 **Portland Business License.** Obtain a city of Portland Business License.
- 5.5.3 **Equal Employment Opportunity (EEO).** Certify as an EEO employer.

**Please Note:** Only those Proposers that are awarded a contract are required to comply with this section.

## 6.0 CONDITIONS OF THIS RFP

Prosper Portland, in its sole discretion, reserves the right to change or cancel this RFP at any time, to waive minor informalities of any proposal, request additional information to evaluate a proposal, and negotiate contract with the successful proposer(s). All proposals will become the property of Prosper Portland and will be subject to public inspection under the Oregon Public Records Law (ORS 192). All matters not specifically addressed in this RFP or the Contract(s) will be governed by the Oregon Public Contracting Code (ORS Chapter 279A-C) and Prosper Portland’s administrative rules for public contracting.

## RFP 19-01, Equity Practitioner Advisory Group Proposal Form

Proposer's Name: \_\_\_\_\_

Business Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Please provide a brief answer (2 – 4 sentences) for each of the following questions.**

1. Tell us why you are interested in this project.
2. How many years have you facilitated and consulted on culture change work as it relates to racial equity? \_\_\_\_\_
3. Give us a sense of how you approach racial justice work.
4. How would you recommend balancing the urgent need for the private sector to have culture change resources and the need to ensure those resources don't create harm?
5. Are you able to attend all meetings in person as noted below? **Yes** \_\_\_\_\_ **No** \_\_\_\_\_  
**Initial Meeting:** October 3, 9:00am – 5:00pm  
**Mid-Point Meeting:** October 24, 1:00pm-5:00pm  
**Two-Day Work Session:** November 18 – 19, 9:00am–5:00pm  
**Final Work Session:** December 12, 1:00pm-5:00pm

*Note: meetings will be held at Prosper Portland (222 NW Fifth Avenue, Portland, OR)*

6. List three professional references, including their name and phone number.

Reference Name and Title	Reference Phone Number

7. Please select any of the following that you specialize in:

- Working with Small Businesses (< 50 employees)
- Working with Large Businesses (> 1000 employees)
- Leadership / CEO Engagement
- Equity Training Facilitation
- Equity Strategy Development
- Other, please specify: \_\_\_\_\_

8. Indicate below if you would you be interested in completing Scope B of the work as defined in Section 3.2?

**Yes** \_\_\_\_\_ **No Thank You** \_\_\_\_\_

9. Provide any other information you feel Prosper Portland should consider when reviewing your response to this RFP.