

EDI Consultant Proposal

TASK	DESCRIPTION	HOURS
Preliminaries and Discovery	Project kickoff, initial leadership interviews (virtual); design communication strategy	8
Dispel EDI Myths	Up to 3, 90-minute information sessions for staff, leadership, elected officials. May be delivered virtually (e.g., webinar style or prerecorded video).	6
Confirm Commitment of Planning Staff & Steering Committee	Collaborate with EDI Coordinator to recruit, select, and confirm 9-month commitment of staff for this project.	3
Strategic Plan Development		
Deep discovery and 1:1 Interviews with Stakeholders	Up to 10 interviews and/or group meetings with key stakeholders (e.g., members of the Staff Planning and Steering Committee, City Manager, EDI Coordinator, and others).	10
Generate Report on Municipal EDI Strategic Plans	Conduct background research and fact finding; construct report on leading practices and examples of EDI strategies for similarly situated municipal governments.	14
Conduct Leadership Alignment Sessions	Customize and facilitate 4, 90-minute sessions with City leadership (may be elected or appointed) and other key stakeholders); 2-facilitators. Prepare report on alignment outcomes and distribute summary reporting to participants. Facilitate follow-up 1:1 coaching as requested.	24
Align on Mission, Vision, and Values	Facilitate 2, 2-hour sessions with the Staff Planning and Steering Committee to develop EDI Mission, Vision, and Values statements. Summarize results and findings, distribute to Steering Committee for clarification, feedback, and comment. Revise the Strategic Planning House with results.	8
Align on Foundational Elements	Facilitate 2, 2-hour sessions with the Staff Planning and Steering Committee to develop EDI Foundational Elements with 1 or 2 facilitators. Summarize results and findings, distribute to Steering Committee members for clarification, feedback, and comments. Update the Strategic Planning House with results.	8

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<p>Provide Guidance on Development of Strategic Priorities</p>	<p>Collaborate with BIPOC Committee to collaborate on strategic priorities. Gain consensus on the definition of each strategic priority and revise the Strategic Planning House with results.</p>	<p>6</p>	
<p>Build SMART Goals and Measures</p>	<p>Facilitate a 2-hour learning/coaching session on SMART goal construction to include an exercise for each Staff Planning and Steering Committee member to construct a SMART goal that is connected to a strategic priority.</p> <p>Gather notes and worksheets from the Steering Committee members and facilitate a second 2-hour discussion on goals to include performance measures and timeline.</p>	<p>12</p>	
<p>Design the Strategic Plan, submit for review, Finalize Document</p>	<p>Draft the strategic plan (text only for the first draft) to include mission, vision, values, strategic priorities, and a detailed strategy for goals, objectives, timelines, and performance measures for an 18 month to 3 year period (depending on results).</p> <p>Submit to Steering Committee members for review and comment, revise as necessary (typically requires at least 3 rounds of revision)</p> <p>Facilitate a 90-minute session to present strategic plan draft and gain consensus on results.</p> <p>Draft final plan to include all previous elements, plus graphics and images.</p>	<p>26</p>	

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Outreach and Culture Development			
<p>Assess Staff Readiness for EDI</p>	<p>Conduct up to 10 individual interviews and 4 focus groups (one consisting of Steering Committee members, 1 random selection, and 2 affinity or identity groups). Target participation for each focus group is 7 participants. We recommend oversampling.</p> <p>Analyze qualitative data using inductive coding and thematic analysis procedure.</p> <p>Prepare “readiness report” and submit to client for feedback and comment. Revise as necessary.</p> <p>OPTIONAL: Administer the Intercultural Effectiveness Scale (IES) to individual interviewees and focus group participants; generate a group report. This assessment instrument is useful to determine if there are differences between qualitative data and a quantitative assessment with statistical validity. The cost of each assessment is an additional \$30</p>	<p>26</p>	
<p>OPTIONAL: Collaborate with EDI Coordinator on Development Event Design and Support</p>	<p>Facilitate a 1-hour meeting to collaborate on need, any gaps identified in the readiness report, and select events. Summarize results and report back to City.</p>	<p>4</p>	
<p>OPTIONAL: Co-facilitation of Events with EDI Coordinator (up to 3 2-hour events)</p>	<p>Collaborate on design and facilitation of events selected in previous step.</p>	<p>20</p>	