



Request For Proposal (RFP)
for
The Town of San Anselmo

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SUMMARY

The Town of San Anselmo (the Town) is seeking proposals from qualified professional consultants to provide diversity, equity, and inclusion (DEI) consulting services. The Town intends to select a consulting partner to lead DEI auditing and training activities as key components in implementing a comprehensive DEI Program. This document constitutes a proposal by [ReadySet](#) in response to The Town's *Request for Proposal - Racial Equity Audit and Training*, as a firm who can take the lead in the design, development, and implementation of these initiatives.

ABOUT US

Who is ReadySet?

ReadySet is a Black Woman-owned DEI strategy, consulting, and training professional services firm that specializes in integrating and embedding DEI strategies and practices within innovative organizations. Founded in 2015, ReadySet has helped over 100 organizations to date in developing a high-impact approach to diversity, equity, and inclusion. Our clients span industries from tech to city governments and nonprofits; from small startups to social change organizations; and from local to regional to large multinational global entities. We bring a holistic and intersectional approach utilizing field-tested best practices and a strong emphasis on data-driven solutions that is intrinsic to our team's deep experience in both academia and the field.

Our work can be separated into the following areas of expertise:

- Assessment and Data Analytics: We offer a bird's eye view of every organization. Our assessment strategies include data and document reviews, focus groups, one-on-one interviews, and surveys to better understand equity, inclusion, and diversity needs.
- Metrics, Benchmarking, and Impact Assessments: We help our clients develop targeted goals and monitor the success of their DEI programs and initiatives - much like a DEI scorecard.
- Talent Strategy: We assist teams in developing and implementing custom approaches to recruiting, retention, and professional development through a business-informed DEI lens that feels organic and woven into company processes. We work with leaders to understand what organizational and cultural dynamics may get in the way of attracting,

retaining, and promoting team members from underrepresented groups and invigorate employees about their access to opportunity.

- Process and Policy Design: We design custom processes to create inclusive work practices and cultures. We review, revamp and create elements such as employee handbooks, company policies, and inclusive principles for functional practice.
- Learning and Development: We equip employees, managers, team members, and leaders with tools to foster belonging across the organization through our workshops, trainings, and coaching services.
- Executive and Individual Staff Coaching: We help strengthen the capacity of leaders and front-line managers to build and manage diverse and inclusive teams. We also work with individual contributors and members to build professional capabilities and DEI capacity.
- Communication Support: From web copy to public events, we help companies effectively communicate internally and externally about their DEI values, goals, and programming.
- Change Management: We support individuals, managers, and executives with the tools necessary to successfully and sustainably make the programmatic and cultural changes necessary to become more diverse and inclusive.
- Ongoing Consulting and Advisory Services: These services can help embed DEI practices in company practices and processes.

Why ReadySet?

Our Human-Centered Values

One of the core beliefs that we hold at ReadySet is that no social justice work can be done well without applying the principles and outcomes we aim to achieve — including diversity, equity, and inclusion — to the methods by which we do them. More simply said, the “how” matters just as much as the “what.”

Our “how” comes to life in the way that we continuously seek to minimize harm, take an intersectional lens to the work, and center people first — especially those with minoritized identities — every step of the way. This way of doing our work and creating meaningful impact for our clients endures because of the foundation in human-centered values that motivate everyone at ReadySet. They are:

- *Empathy*: The DEI journey is deeply personal, and oftentimes charged in the work context. We focus on the humans we are in conversation with and acknowledge shared experiences, knowing the only way through is together.

- *Growth Mindset*: The DEI journey can also mean looking at uncomfortable truths. We encourage our clients to learn from these challenges and choose a different course of action forward.
- *Enthusiasm*: DEI work is iterative and takes time and intention to do well. There is rarely a quick fix, so you need something meaningful to keep you going. For all of us at ReadySet, this work is our calling.
- *Creativity*: Our rigorous, data-focused approach, our holistic and integrated design, and our high-touch, personalized process create the right conditions for creative thought partnership.
- *Integrity*: Every organization is different, and every solution is unique.

Our High-Touch, Data-Driven Approach

While no one has perfected how to apply DEI principles to better support organizations in a comprehensive manner, we strive for better organizational practices through:

- Emphasis on Data – ReadySet loves data. To ensure we drive successful initiatives that are targeted, context-specific and high impact, we ground our work in data collected and analyzed during the initial assessment process – from partnering to build or update an organization-wide survey, to researching best practices, to one-on-one discussions with staff – and use this information to develop a baseline to benchmark our initiatives in the long term. By emphasizing data from the beginning of the engagement, and translating insights into specific actions that can be taken daily, we move our clients from *what sounds good* to *what works*.

We start our assessment process for each engagement by reviewing existing documents and materials to accelerate our understanding of the organization. If recent survey data is not readily available, we collaborate with stakeholders to tailor a survey to touch on key topics or look outside the organization for evidence-based best practices, and potentially even user testing. Our team of people scientists analyzes the data across demographic groups with an intersectional lens for interesting insights and areas of impact, which then helps us discover gaps and patterns to further investigate.

We value the stories and voices of the people who make your organization run. During the qualitative phase of the assessment, we talk to members of the community across the organization, from managers and individual contributors, across departments, and teams to get a rich and deep understanding of root causes. This allows us to formulate an impactful and effective strategy that focuses on both easy wins and long-term growth areas.

- Tailored and Integrated Design – Taking into account the multi-state context of the Town, we know a check-the-box solution or generic audit approach won't work. To scale quickly,

once we have done the initial data gathering, the next step will be to dive into strategic problem-solving work sessions with designated Town staff to dig into the “why” of DEI focused questions, and then translate this understanding into a framework for the Town’s stakeholders. Ultimately, this approach lays the foundation for sustainable organizational change.

- Participatory and Consultative Approach – ReadySet believes that a participatory, consultative approach, which emphasizes collective buy-in, is most conducive for the successful implementation of DEI work. We anticipate including a core group of designated Town staff at every stage of the engagement: data-gathering and assessment, strategic working sessions, and recommendations development, to ensure institutional knowledge from the ground up. Since key stakeholders have understood each step of the journey, they know the “why” behind decisions and are able to continue to evolve the work long after the engagement ends.
- Adaptive Learning Methods to Build Capacity – Our pedagogical approach utilizes a range of different types of learning. We provide varying ways to learn and engage with materials presented during any training, including written materials, presentations, and interactive exercises. In customized training, we build individuals’ capacity through highly interactive and experiential learning. We encourage open dialogue and group discussion. We bring a heavy emphasis on the practical application of strategies and tools participants can immediately implement to foster growth outside of the workshop setting.

Experience with Local, Regional, and National Governments

We recognize and respect the Town’s desire to partner with a firm possessing experience with local and regional governments. Our portfolio of clients currently includes a variety of public sector serving and public facing mission focused government organizations including the Town of Los Gatos, California; California State Assembly; San Francisco Public Utilities Commission; and United States Forest Service. Furthermore, our team is composed of [numerous consultants](#) with government focused professional and academic qualifications.

Our Deep Expertise and Relevant Qualifications

Our team is diverse, and our approach intersectional, grounded in varied academic and business disciplines. Our seasoned network of consultants is composed of professionals with decades of experience organizing around DEI as well as in the areas of talent strategy, learning and development, and organizational change. Our incredibly diverse team includes a multitude of intersecting identities and backgrounds; over half are women-identified, over half are People of Color, and more than a third are LGBTQ+.

While CEO, [Y-Vonne Hutchinson](#) and COO, [Rachel Marcuse](#) will oversee the project as needed, consultants and subject matter experts who may likely be part of this engagement include:

[Christopher Riddick, Ed.D.](#) - Dr. Riddick has over ten years of experience in the management consulting industry, focused primarily on people practices, organizational development, and change management in the public sector. Chris received both his Bachelor of Arts in Public Policy Analysis and Master of Public Administration from the University of North Carolina at Chapel Hill. He also holds a Master of Science in Education degree from Indiana University. He completed his Doctor of Education in Organizational Change and Leadership from the University of Southern California's Rossier School of Education where his dissertation focused on barriers to racial and ethnic staff diversity in nonprofit organizations.

[Jennifer Bustamante, Ph.D.](#) - Dr. Bustamante holds both an M.A. and a Ph.D. in Social-Organizational Psychology from Columbia University. As a People Scientist and consulting leader with decades of experience planning, developing, and executing DEI initiatives, she has developed data-driven strategic initiatives for clients in varied industries. She is a fluent, bilingual (English/Spanish) strategist effective at analyzing and synthesizing data to identify cultural challenges and develop tailored and targeted solutions. Prior to ReadySet, she served as a Talent and Organization Consulting Manager at Accenture where she designed and implemented organizational enhancements for numerous organizations.

(Please note that final staffing decisions will be made during the contracting phase of the engagement should ReadySet be awarded. Additional advisory or subject matter expertise will be pulled from the rest of the ReadySet team as the project requires. Detailed Team Bios can be found on our [team webpage](#).)

READYSET APPROACH TO ENGAGEMENT

Overview of Our Plan

Why this work matters: The Town is committed to institutionalizing DEI into its organizational practices through creating and implementing DEI policies that benefit both its internal and external stakeholders. If the lens of DEI is not successfully applied and integrated into the Town's policies, practices, and procedures the Town runs the risk of not achieving the outcomes of this important initiative.

The major outcomes and endpoints for this engagement are outlined in the following proposed activities (note that these are sample dates and will be confirmed and finalized at contracting):

Organizational Assessment + DEI Audit *(July - October 2022 or approximately four months)*

1. Perform a “current state” assessment of the Town’s culture in conjunction with designated Town staff with an emphasis on auditing and understanding the Town’s DEI practices and competencies: This phase will include:
 - A review and analysis of existing data, including demographic and service data. A DEI sentiment survey may be conducted, in partnership with a third party survey platform, to provide supplemental information in the DEI Audit;
 - Conducting 1:1 interviews and leading focus groups with key stakeholders as identified by the Town’s staff;
 - A review of all pertinent organizational policies and documents with a lens towards the Town’s DEI current state..

At the conclusion of the assessment phase, ReadySet will deliver a Summary Report Out (Findings and Recommendations), guided by the information gleaned in the “current state” assessment and existing data analysis. In this Report Out, our team will present insights and findings including areas of strength and areas of opportunity for growth. It will also include strategic recommendations and opportunities for tracking and communicating progress. We will also present recommendations for additional data to inform the Town’s DEI goals.

Our Strategic DEI Approach: Proposed Budget and Timeline

The estimated completion dates and budget for the proposed activities are as follows. Please note that these dates and prices will be finalized as part of scoping and contracting conversations - this is only a sample schedule.

The anticipated start date is in July 2022. Additional details regarding our projected timeline are provided below. Prices reflect our government discount.

Organizational Assessment and DEI Audit (July - October 2022)	
We will conduct an Organizational Assessment and DEI Audit to achieve a deep understanding of the Town's current cultural context, leadership vision, and specific needs. The data collected during the audit will validate current risk areas and identify any potential additional gaps. From that point, we will provide a baseline from which to measure success, as well as incorporating community perceptions and fluency around DEI.	
Scope	Work Process
<p>Goal: To gain a current state understanding of the Town's DEI climate and organizational policies and processes as related to DEI.</p> <p>Activities will include:</p> <ul style="list-style-type: none"> • <u>Kick Off to Community Presentation:</u> ReadySet can conduct a kick off presentation to the community in order to explain and align around the assessment and build rapport with the staff. • <u>Stakeholder Engagement:</u> ReadySet will conduct independent interviews, and focus groups, to obtain additional feedback and provide a qualitative assessment of DEI with the Town's staff members and elected officials. • <u>Internal and External Policy Review; Internal Equity Evaluation:</u> The internal equity audit includes a review of existing documents regarding program information and evaluation, surveys, human resource policies and procedures, marketing materials, the Town's website and online presence, and other pertinent documents to develop a more comprehensive understanding of the organizational climate in relation to the Town's DEI goals. • <u>Data Analysis:</u> ReadySet will review and interpret available demographic and service data for the Town in relation to the 	<p>Kick Off to Community (30 mins)</p> <p>Data review and analysis (2-4 weeks)</p> <p>10 1:1 stakeholder interviews and up to 3 focus groups; aiming to talk to a representative sample of the Town's staff, elected officials, Committees, Commissions, citizens, and civic partners (6-8 weeks)</p> <hr/> <p>Internal and External Policy Review; Internal Equity Evaluation (3-4 weeks)</p> <hr/> <p>Analysis and synthesis of all quantitative and qualitative</p>

<p>Town's workforce and the communities they serve. If the need arises, we will also partner with the Town and a third party survey vendor to conduct a supplemental DEI sentiment survey. <i>(This supplemental survey is not currently included in the scope.)</i></p> <ul style="list-style-type: none"> ● <u>Findings, Recommendations and Presentation</u>: The data collected will be analyzed to ascertain alignment with best practices, target focus areas and assign priorities/next steps. It will also be used to develop: <ul style="list-style-type: none"> ○ <u>Learning and Development Plan</u>: Following a review of the Town's DEI audit, determine what areas need culturally competent trainings and employee engagement. ● <u>Project Management Support</u>: Support for the assessment phase includes, but is not limited to: project planning, activity coordination and management, meeting logistics and participation. 	<p>data sources at completion of assessment (4-6 weeks)</p> <hr/> <p>Findings and Recommendations Presentation; L&D Plan (4-6 weeks from assessment completion)</p> <p>3hrs/month of ongoing project management support for length of phase</p> <hr/> <p>Deliverables for this Phase</p> <ul style="list-style-type: none"> ● High Level Project Plan for entire engagement ● Data analysis of demographic data and services provided ● Data visualization (graphs) and insights for Findings Document ● Findings and Recommendations Presentation Deck ● 90-minute report out to designated staff ● DEI Capability Building and Training Plan
<p>Total:</p>	<p>\$69,575</p>

Ongoing Support and Advising

As the work to improve, build, and embed best practices and programming related to DEI into the Town continues, we are available to support leadership and staff in its implementation through ongoing coaching and/or consulting hours. This may include advising on employee engagement programs, events, incident-response, internal and external communication, policy and process changes, and initiative development. We can also help the team benchmark and track progress of initiatives as you scale.

Project Management and Support

The point of contact through the RFP process will be Dr. Christopher Riddick. After contracting, the Town will be coordinating with the assigned project lead and consultant(s) directly. As mentioned above, the Town will provide administrative and project resources to support initial discovery and ongoing project work, including assistance in the collection of documents, scheduling, etc.

At ReadySet, we pride ourselves on our responsiveness. *We expect to be available on the same day for urgent issues, within 24 hours for time-sensitive issues, and within 72 hours for other email or phone correspondence.* Some of our consultants are with us part-time and we are distributed across the United States, so we ask for your flexibility with scheduling.

NEXT STEPS

We hope this proposal addresses your needs. We look forward to talking through this proposal with you in more detail and incorporating your thoughts and clarifications. If we reach an agreement to move forward, we will follow-up with our standard services agreement.