



WASHINGTON STATE
**HOUSING FINANCE
COMMISSION**

Opening doors to a better life

**REQUEST FOR PROPOSALS:
RACIAL EQUITY CONSULTANT**

**Deadline for submission:
Thursday, October 7, 2021
5:00 p.m. Pacific Time**

Please email to:

**Jama Hawk
jama.hawk@wshfc.org
Washington State Housing Finance Commission
1000 Second Avenue, Suite #2700
Seattle, WA 98104-1046**

**WASHINGTON STATE HOUSING FINANCE COMMISSION
REQUEST FOR PROPOSALS
RACIAL EQUITY CONSULTANT**

INTRODUCTION AND BACKGROUND

ISSUING OFFICER

Jama Hawk
Admin Services Manager
1000 Second Avenue, Suite 2700
Seattle, Washington 98104-1046
(206) 287-4429
jama.hawk@wshfc.org

INTRODUCTION

The Washington State Housing Finance Commission (the “Commission”) is requesting proposals from experienced and engaging consultants with in-depth knowledge of and a proven track record in working with organizations around racial justice and social equity. The Commission’s goal is to engage a racial equity consultant to work through identified steps in anti-racism and the development of a racially equitable organization. The consultant will work with the Racial Justice and Equity Team (RJET), the management team and board members to address racial inequity. The consultant will also participate as the Commission begins a strategic planning process through recommendations in the development of the Strategic Planning RFP as requested by leadership and the RJET team.

This RFP identifies the services to be provided, the selection criteria, and the terms and conditions which will apply. The contractor selected in this process will work with RJET, executive leadership and the contract manager to provide the scope of services described pursuant to this RFP.

The Commission shall bear no costs of or obligations to the proposing agency(s) in connection with responses to this RFP.

BACKGROUND INFORMATION

To transform itself into an organization focused on anti-racism and economic equity in Washington state, the Commission developed a Racial Justice and Equity Team and has begun to review its housing programs for parity. The Commission needs assistance with facilitation of internal conversations with its employees and board of commissioners regarding its commitment to removing barriers to affordable housing for people of color in Commission programs and in the communities the Commission serves.

In addition, the Commission will continue to develop its racial equity plan and will include both internal policy work and revision of its housing program policies. The Commission will then utilize its existing lending programs, partnerships, and successful marketing programs to achieve this goal.

To this end, the Commission is looking for a consultant who will also offer recommendations toward its long-term racial equity plan.

TIME PERIOD

The Commission expects the contract period for this contract to be approximately one year from the start date of the contract.

CONTRACT AMOUNT

Services will be performed on a time and material basis at hourly rates or on agreed upon project costs, as authorized.

TIME SCHEDULE FOR COMPLETION OF THIS RFP

RFP Posted: Thursday, September 23, 2021
Proposals Due: Thursday, October 7, 2021, at 5:00 PM, Pacific Time

Interviews may be conducted at the Commission's discretion and a final decision may be based solely on submitted proposals.

Interested parties must submit their proposals no later than 5:00 p.m. Prevailing Pacific Time on **Thursday, October 7, 2021** via email to:

jama.hawk@wshfc.org

The Commission reserves the right to modify the time schedule, including extending the proposal due date, with notice to all potential proposers that have submitted a letter of intent to submit.

QUESTIONS

Questions regarding the information contained in the RFP must be submitted electronically to the designated RFP contact, Jama Hawk at jama.hawk@wshfc.org, no later than 5:00 PM Prevailing Pacific Time, September 30, 2021. All questions will be answered and posted on the Commission's website at www.wshfc.org.

PROPOSAL SUBMISSION

If your organization is interested in working with the Commission as a racial equity consultant, please submit a proposal electronically to the Commission by **5:00 PM Prevailing Pacific Time, on or before Thursday, October 7, 2021** to: jama.hawk@wshfc.org

***ALL MATERIALS MUST BE SUBMITTED ELECTRONICALLY
NO FACSIMILE (FAX) TRANSMITTED PROPOSALS WILL BE ACCEPTED.***

Late Submissions: A proposal shall be considered late if received at any time after 5:00 p.m., Prevailing Pacific Time, October 7, 2021. Proposals received after the specified time WILL NOT be given further consideration.

Prior to the date and time designated for receipt of proposals, any proposal may be modified or withdrawn by email notice to jama.hawk@wshfc.org. Such notice shall be delivered on or before the date and time set for receipt of proposals.

As of the date of this request and except as provided in this paragraph, there shall be no ex parte communication with Commissioners, staff, or others participating in the selection process except as set forth below in this paragraph. Any such ex parte communications shall be grounds for disqualifying the Proposer. All communications concerning the selection process should be addressed to Jama Hawk, Admin Services Manager, Washington State Housing Finance Commission, (206) 287-4429 or jama.hawk@wshfc.org.

By submitting a proposal, Proposers agree that they waive any claim against the Commission, the State of Washington, and their respective officers, employees, and agents for the recovery of any costs or expenses incurred in preparing and submitting a proposal or participating in an interview, if required.

CRITERIA FOR EVALUATING PROPOSALS

The Commission's staff will evaluate all proposals and make a decision that staff believes to be in the best interest of the Commission. Price will not be the sole determining factor in the selection of a proposal. The Commission shall not be obligated to award a contract pursuant to this Request for Proposal and may reject any or all proposals.

PROPOSAL FORMAT

All submitted proposals will be in a Calibri using a 12-point font and limited to 12 pages.

Principal considerations will be:

1. Demonstrated experience as a consultant and leader in racial justice and equity work.
2. Demonstrated experience in group facilitation in the racial equity field.
4. Demonstrated track record providing outstanding customer service.
5. Although cost will not be the sole determining factor in the selection of a proposal, it will be considered.

SCOPE OF SERVICES TO BE PERFORMED

We expect the consultant to assist in the following activities:

General Activities

- Working in collaboration with the Racial Justice and Equity Team (RJET), Commission staff and board members, conduct dialogues with staff to identify any inequities and, racial and equity barriers by the Commission, with its board, and through its programs. There will be approximately 10-15 facilitated sessions with identified groups.
- Conduct a series of dynamic conversations with division management and the Commission's board in response to Commission-wide dialogue findings.
- Make recommendations for the strategic planning RFP as requested by leadership and the RJET team. Assist in the orientation of selected strategic planning consultant to ensure continuity of racial equity values.
- Unidentified additional work/activities to be determined with Commission leadership to further its anti-racism work. Direction will be determined by the completion of bullets #1 and #2 above. Additions to the Scope of Work and milestones will be agreed upon in writing.

CONTRACT GENERAL TERMS AND CONDITIONS

The successful applicant will be expected to enter into a contract generated by the Commission in accordance with guidelines provided by the State of Washington, including its general terms and conditions and other standard provisions customary to such contractual agreements. In no event is the applicant to submit its own standard terms and conditions in response to this procurement. The applicant may submit exceptions to the general terms and conditions. The Commission will review requested exceptions and accept or reject the same in its sole discretion.

Insurance Coverage

The selected contractor is to furnish the Commission with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The contractor shall, at its own expense, obtain and keep in force insurance coverage that shall be maintained in full force and effect during the term of the contract. The contractor shall furnish evidence in the form of a Certificate of Insurance that insurance has been provided, and a copy shall be forwarded to the Commission within fifteen (15) days of the contract effective date.

Liability Insurance

Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If

CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the “each occurrence” limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the “each occurrence” limit. All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract) and contain separation of insured’s (cross liability) condition.

Additionally, the contractor is responsible for ensuring that any sub-contractors provide adequate insurance coverage for the activities arising out of subcontracts. In the event that services delivered pursuant to this contract involve the use of vehicles, either owned or unowned by the contractor, automobile liability insurance shall be required. The minimum limit for automobile liability is:

- \$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage.

The insurance required shall be issued by an insurance company/ies authorized to do business within the state of Washington, and shall name the state of Washington, its agents and employees as additional insureds under the insurance policy/ies.

All policies shall be primary to any other valid and collectable insurance. Contractor shall instruct the insurers to give the Commission thirty (30) calendar days advance notice of any insurance cancellation.

Contractor shall submit to the Commission within fifteen (15) calendar days of the contract effective date, a certificate of insurance that outlines the coverage and limits defined in the Insurance section. Contractor shall submit renewal certificates as appropriate during the term of the contract.

Employers Liability (“Stop Gap”) Insurance

In addition, the contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

Additional Provisions

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The Washington State Housing Finance Commission, its elected and appointed officials, agents, and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with the contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the Commission.
2. **Cancellation.** Washington State Housing Finance Commission shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the State forty-five (45) days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the State

shall be given ten (10) days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The State shall be given twenty (20) days advance notice of cancellation. If cancellation is due to non-payment of premium, the State shall be given ten (10) days advance notice of cancellation.

3. Identification. Policy must reference the State's contract number and the agency name.
4. Insurance Carrier Rating. All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best's Reports. Any exception shall be reviewed and approved by Washington State Housing Finance Commission. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with Chapter 48.15 RCW and 284-15 WAC.
5. Excess Coverage. By requiring insurance herein, the State does not represent that coverage and limits will be adequate to protect contractor, and such coverage and limits shall not limit contractor's liability under the indemnities and reimbursements granted to the State in this contract.

Proprietary Information/ Public Disclosure

All proposals will become the property of the Commission and will not be returned to the proposer.

All proposals received shall remain confidential until the contract is awarded. If any contract resulting from this RFP is signed by the Executive Director of the Commission and the apparent successful contractor, the proposals shall be deemed public records as defined in RCW 42.17.250 to 42.17.340, "Public Records."

Any information in the proposal that the contractor desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.17.250 to 42.17.340 must be clearly designated. The page must be identified and the particular exception from disclosure upon which the contractor is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right-hand corner of the page.

The Commission will consider a contractor's request for exemption from disclosure; however, the Commission will make a decision predicated upon Chapter 42.17 RCW and Chapter 143-06 of the Washington Administrative Code. Marking the entire proposal exempt from disclosure will not be honored. The contractor must be reasonable in designating information as confidential. If any information is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping public records, as outlined in RCW 42.17.300. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

PROPOSER QUESTIONNAIRE

PROPOSAL INSTRUCTIONS

Letter of Transmittal

Attach a letter of transmittal, which includes the following information:

1. Contact name, business name, business address, telephone number, fax number and e-mail address of interested proposer(s);
2. Date of proposal;
3. A statement that the proposal is valid for 3 months after the deadline for submission of proposals; and,
4. A signature of the officer or employee who certifies that he or she has the authority to bind the interested proposer(s).

Proposal

The proposal should address all the “Criteria for Evaluating Proposals” outlined in this RFP and answer the following:

1. State full name and address of your institution and identify the parent company if you are a subsidiary. Specify the branch office or other subordinate organization which will perform, or assist in performing, the work to be performed. Indicate whether you operate as a partnership, corporation, or sole proprietorship. You must submit evidence of authorization to do business or operate in Washington.
2. State full name and address of contact of individual who be responsible for our account as applicable.
3. Provide resumes (not to exceed 2 pages) of the specific individual who would be assigned to work with the Commission, the estimated percentage of time each person would devote to the Commission, the nature of work that each person would perform, and where each person would be located.
4. Please provide examples of your experience working with other clients who sought your services to focus on anti-racism throughout their internal or external programs and communication.
5. Describe your experience facilitating with groups in the anti-racism arena. Give examples of success and of challenges.
6. Provide a list of other clients within the past 24 months giving a brief description of the work you did with them. Provide examples of creative solutions accomplished in implementing a plan.

7. Please include three (3) references. Please list references by name, address, and telephone, as well as the type of engagement.
8. Describe your approach to project management and the ability to design and execute the plan in a timely manner.
9. What creative ideas can you suggest to the Commission for a racial equity program, so it is successful as it approaches this long-term racial justice effort.

Fee Proposal

1. What is your hourly rate? This is of particular interest as a large percentage of work under this contract will be identified after the first goals in the Scope of Work have been met and further direction is identified.
2. Provide a timeline for deliverables including benchmark steps and an estimate of hours needed for each activity you will take to provide a written recommendation to the Commission. Please provide a total fee for this deliverable.
3. What guarantees will you provide to the Commission to stay within your designated budget?

Commission Perspective

The Commission reserves the right to request additional information from any applicant to assist the Commission in understanding or clarifying the terms of any proposal.

The Commission reserves the right to waive minor deficiencies in a proposal. The decision as to whether a deficiency will be waived or will require the rejection of the proposal will be solely within the discretion of the Commission. Applicants are cautioned that failure to comply with or respond to any part of this RFP that requires a response may result in rejection of proposals.

The Commission reserves the right to investigate references and past performance of any proposing agency with respect to its performance of similar services, compliance with the RFP and contractual obligations, and its lawful payment of suppliers, subcontractors, and workers. The Commission reserves the right to reject any proposal at any time prior to execution of a contract.

The Commission has the sole discretion and reserves the right to reject any and all proposals received in response to this RFP and to cancel this solicitation if it is deemed in the best interest of the Commission to do so. Issuance of this RFP in no way constitutes a commitment by the Commission to award a contract, or to pay an applicant's costs incurred either in the preparation of a response to this RFP or during negotiations for services. The Commission also reserves the right to make amendments to this RFP by giving written notice to applicants, and to request clarification, supplements and additions to the information provided by an applicant.

By submitting a proposal in response to this solicitation, applicants understand and agree that any selection of an applicant or any decision to reject any or all responses shall be at the sole

discretion of the Commission. Additionally, by submitting a proposal, applicants agree that they waive any claim against the Commission, the State of Washington, and their respective officers, employees, and agents for the recovery of any costs or expenses incurred in preparing and submitting a proposal.

The Commission shall not be required to accept any proposal solely on the basis that it contains the lowest price for completion of the work contemplated by this RFP and the Commission reserves the right to negotiate the final contract price.

Debriefing of Unsuccessful Contractors

Applicants whose proposals have not been selected for further consideration will be notified via e-mail. Only applicants who have submitted a proposal under the criteria established by the Commission may protest the rejection of a proposal and request a debriefing. Upon request a debriefing will be scheduled with an unsuccessful applicant. The request for a debriefing must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Bidder Letter is e-mailed to the bidder. The debriefing must be held within three (3) business days of the request. Discussion will be limited to a critique of the requesting applicant's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

Protest Procedures

All protests, either against the solicitation or the award, must be in writing or contain the original signature of the protesting party or authorized agent. Such protests must state all facts and arguments on which the protesting party is relying as the basis for its action. Copies of the protest must be mailed or hand-delivered to the office of the Commission.

Protests against the solicitation must be received by the Commission in writing no later than 5:00 PM Prevailing Pacific Time two (2) business days prior to the date proposals are due. Filing of a protest against the solicitation does not entitle the protesting party to an extension of time for submitting its proposal.

Protest involving the rejection of a proposal must be received by the Commission in writing no later than 5:00 PM Prevailing Pacific Time on the fifth (5th) business day following the interested applicant(s)'s receipt of the notice of rejection, whether oral or written, or the announcement of the apparent successful interested applicant(s), whichever occurs first. Only those who are eligible to submit a proposal under the criteria established by the Commission may protest the rejection of a proposal.

The Executive Director of the Commission will consider the record and all facts available and issue a decision within five (5) business days from receipt of the protest unless additional time is required, in which case the protesting party will be notified by the Commission. The decision of the Executive Director will be final.