

Request for Proposals
Yale Alumni Task Force on Diversity & Inclusion

Overview

The Yale Alumni Diversity and Inclusion Task Force was established in February of 2016 to work in partnership with the Board of Governors of the Association of Yale Alumni (AYA), AYA staff and the administration of the University and given the following responsibilities:

- Evaluate current alumni programs offered through AYA and other alumni organizations for effective diversity and inclusion engagement, taking a comprehensive approach that considers race, ethnicity, gender, sexual orientation, disability, age, and other factors that shape perspective and experience. Benchmark relevant programs and best practices at peer institutions in higher education and in the public or private sectors as appropriate.
- Develop a diversity and inclusion strategic plan with specific, measurable, achievable, realistic and time-bound ways to strengthen and expand participation throughout the alumni community. Develop a checklist for alumni volunteer leaders of opportunities to strengthen or create new engagement through their initiatives and programs. Identify parameters for accountability and assessment to assist alumni leaders in measuring progress.
- Document ongoing diversity and inclusion efforts in alumni leadership and identify mechanisms for strengthening diversity at all levels of the alumni leadership pipeline. Consider leadership and recognition in all its forms across the broad spectrum of the Yale alumni community including: current AYA programs (Clubs, Classes, SIGs, Graduate School, advisory groups, and initiatives), Alumni Fellow and AYA Board nominations, award recognition (Yale Medal, Excellence and Leadership Awards, Howard R. Lamar Faculty Award). Engage with and learn from leadership structures in areas outside AYA's purview such as alumni interviewing, Professional Schools, and athletic alumni associations.
- Establish a template for diversity, inclusion, and cultural competency training for alumni leaders in AYA-affiliated roles (AYA board, Yale Clubs, Classes, SIGs, AYA delegates, Graduate School, advisory councils, initiatives), which may also be made available to other alumni organizations (ASC, professional schools, athletic associations, etc.).
- Provide recommendations for ways to publish and promote diversity-related initiatives and accomplishments in alumni programs. Develop framework for AYA to serve as a resource to ensure effective communication with alumni in addressing their suggestions and concerns.

- Draft an AYA Board of Governors policy statement on diversity, inclusion, and equity that will serve as the vision for the Board's goals in this area. AYA Board of Governors officers will collaborate on the preparation of the policy statement.

To accomplish this work, between February 2016 and June 2016, 20 individuals were recruited to serve as members of the Task Force. These individuals represent the broad diversity of the Yale community, inclusive of a variety social identity factors (race, ethnicity, gender, age, religious beliefs, professions and geographical locations). They are also proven change agents, thought-leaders, and subject matter experts in areas related to diversity, inclusion, and equity.

Supplemental to the Task Force, an Advisory Committee of 23 additional alum was formed to serve as a resource to the Task Force. The members of the Advisory Committee function as thought-partners, advisors, document reviewers and in other support roles to assist with the accomplishment of the charge of the Task Force.

The Task Force met in person in June 2016 and subsequently has held monthly conference calls. Operating with three subcommittees (Best Practice and Policy, Change Management and Stakeholder Engagement/Communications), the Task Force is currently conducting research and implementing consciousness-raising programming. Recommendations for on-going diversity, inclusion and equity policies and programming are being formulated.

Yale values diversity and inclusion through alumni engagement, recognizing that all individuals are unique and have important talents, leadership skills, and perspectives to contribute to Yale and our society overall. With that premise as its foundation, the mission of the Alumni Task Force is a) to provide leadership on the development of diversity and inclusion strategies in existing alumni programming, b) to leverage all forms of diversity to strengthen the alumni network, and c) to make recommendations for potential new programming and initiatives that might be offered to the Yale alumni community.

Statement of Purpose

This Request for Proposals is intended to secure the services of a professional writer who will work with the Task Force to prepare a comprehensive report that chronicles the work of the Task Force, summarizes the research conducted and delineates recommendations to enhance the AYA's and University's effectiveness in the areas of diversity, inclusion and equity. The resulting document will be used to 1) inform programming conducted by the AYA and its affiliates, 2) assist the University when responding to issues/concerns related to diversity, inclusion, and equity with respect to students, faculty and staff, 3) help benchmark progress in advancing diversity, inclusion, and equity within the Yale community, and related to students, faculty and staff, and 4) serve as a resource for other colleges/universities and other organizations.

Scope of Work

The contractor selected for this assignment will perform the following tasks:

- a. Review written synopses, from the subcommittees and Task Force as a whole, which summarize meetings, research, events/activities with stakeholders, plans for future events and programming, and other information.
- b. Participate in monthly, one-hour conference calls from March 2017 through June 2017.
- c. Collaborate with the Task Force Co-Chairs to plan the layout and content domains of a comprehensive final report which summarizes the efforts of the Task Force.
- d. Communicate with the leaders of the subcommittees, other members of the Task Force, Advisory Committee members and others, as needed, to clarify and collect information to be included in the final report .
- e. Compile and combine written synopses, information from conference calls and follow up conversations, relevant data and other pertinent information into a scholarly document to be provided by the Task Force to the AYA, University administration and the Yale Corporation, and to be shared with stakeholders.

Contract Award Amount

The amount of the contract award will be between than \$5000 and \$15,000 for all services provided, on a fixed fee basis.

Timetable

Selection of a contractor will be fast-tracked due to an impending deadline to complete the overall project.

ACTION	DEADLINE
Proposals will be accepted beginning on January 30, 2017.	Yale is an equal opportunity employer and educator and works to create a discrimination and harassment-free work environment. Because of the University's commitment to diversity in hiring, proposals will be solicited from an array of sources to ensure inclusion of contractors representing a broad spectrum of social identity factors.
Proposals will be accepted until February 17, 2017.	Proposals and supporting documentation must be submitted to the Task Force by email to info@yalealumniversity.org by close of

	business (5 pm PT/8 pm ET) on February 17, 2017.
Finalist Interviews	As needed, telephone interviews with finalists will be conducted during the week of February 20, 2017. Finalists will be scheduled for interviews after the filing deadline.
Selection of Contractor	Selection of a contractor will be completed no later than February 28, 2017, based on consultation with AYA staff and after review of the submitted materials. Contractors who are able to create a plan which demonstrates their ability to meet the deadlines associated with the project, who submit outstanding examples of similar work and who provide solid references will be given preference regarding the contract award. The project bid amount will also be considered as selection criteria.
Start Date	The assignment will commence on March 1, 2017. The initial set of materials for review from the Task Force will be forwarded by that date.
Collection of Relevant Materials	Relevant materials will be forwarded to the Contractor through March 17, 2017.
Meetings with Task Force members	As needed meetings with Task Force members will be held through March 31, 2017. An in-person meeting with the Task Force will be scheduled for March or April of 2017.
First Draft	By April 28, 2017, a first draft of the comprehensive final report, with an executive summary, must be submitted by the contractor to the Task Force for review and comment.
Submission of Suggested Revisions	By May 12, 2017, requested revisions will be forwarded from the Task Force to the contractor.
Final Report and Executive Summary	The Final Report with the Executive Summary must be finalized and submitted by the contractor by June 16, 2017.

Deliverables

The contractor must provide the following deliverables:

- a. Needs assessment meeting, to be held telephonically (March 2017)
- b. Participation in monthly, one-hour Task Force Conference calls, held the 3rd Tuesday of the month (Beginning in March 2017)
- c. Monthly status updates (beginning April 2017)
- d. Attendance at an in-person Task Force meeting in March or April of 2017.
- e. First draft of the final report and executive summary (April 28, 2017)
- f. Final report and executive summary (June 16, 2017)

Materials Provided

The following documents will be provided to the contractor:

- a. Task Force guiding and organizational documents
- b. Notes from in-person meetings and conference calls
- c. Summary reports from the three subcommittees
- d. Presentations shared with University administration and other stakeholders
- e. Tool kits and similar documentation prepared by the Task Force
- f. Materials disseminated at Executive Forums, Listening Circles and other programming events conducted by the Task Force and/or stakeholders

Contractor Requirements

The selected contractor will meet the following qualifications:

- a. Familiarity with diversity, inclusion and equity concepts and programming
- b. Skill to review and edit written documents
- c. Organizational expertise to compile information from various sources into a unifying, comprehensible format
- d. Verifiable experience preparing annual reports, white papers, analytical analyses or other formal documents
- e. Two professional references regarding preparation of comprehensive reports
- f. Two samples which demonstrate ability to prepare quality (well-written/aesthetically compelling) reports
- g. Availability to participate in monthly, one-hour Task Force calls and to attend an in-person meeting in March or April of 2017.

Submittal Requirements

Proposers must submit the following documents:

- 1) a cover letter with a synopsis of their backgrounds and interest regarding this project;
- 2) a work plan that outlines how they will meet the scope of work, timetable, requirements, etc.;
- 3) a professional resume;
- 4) two references regarding projects that are similar to the scope of this project; and
- 5) consultant expectations/needs for meetings (face-to-face and/or telephonic)
- 6) A requested contract award amount which will cover all billable hours and other anticipated fees for the project.

Budget & Payment Schedule

The contract period for this project is March 2017 through June 2017. The contract will be executed with an all-inclusive award amount. Payment for all fees anticipated by the contractor in relation to this project must be included in the contract amount requested. Once the contract is awarded, payment will be provided in two installments, based on timely submission of deliverables, 45 days after commencement of the contract period and within 30 days after the end of the contract period.

Contact Information

The Co-Chairpersons of the Task Force serve as the leads on this project. Please refer questions regarding the process to Ken Inadomi at ken@cisinfo.net and Sheryl Carter Negash at scnegash@aya.yale.edu .