



TOWN OF  
**SAN ANSELMO**  
EST. 1907

DRAFT Request for Proposals  
Racial Equity Audit and Training

Eligibility: This request is open to parties engaged in the lawful practice of their profession that satisfy the minimum qualifications set forth in this Request For Proposal (RFP). Minority-owned, Women-Owned, and Emerging Small Businesses are encouraged to apply for this opportunity.

**Introduction**

The Town of San Anselmo, nestled at the base of Mt. Tam in Marin County, California, is 2.7 square miles and home to about 13,000 residents. It is approximately 12 miles north of the Golden Gate Bridge and is surrounded by beautiful open space areas with hiking and mountain biking trails. San Anselmo is close to the East Bay, San Francisco, the pastoral West Marin countryside and coastal communities, and nearby wine country.

The Town of San Anselmo is a general law town with a Town Manager form of government. The Town Council consists of five (5) members elected at large and 125 committee and commission members, appointed by the Town Council. In addition, the Town has an elected Town Treasurer and Town Clerk. San Anselmo was incorporated as a municipal corporation on April 9, 1907.

The Town has made a commitment to ensure that Town policies, programs, procedures, and laws are not racist, are free of implicit biases, and that laws are fair and equitably enforced. With the goal of building an inclusive, vibrant, and equitable community the Town is seeking a consultant to conduct an audit of the Town's policies, programs, procedures and laws to be sure that they are fair, equitable and free of biases of any kind and to implement anti-bias, racial equity and other appropriate training for staff. The following scope describes the work to be completed by the consultant.

**Organizational Overview**

The Town of San Anselmo employs 35.60 permanent full-time staff and 28 part time staff. There are six Department Heads, including the Town Manager, four mid-managers and one confidential employee. These employees work in the following town departments: Administration, Building, Public Works, Finance, Human Resources, Parks and Recreation, Library, and Planning. The organization does not include police, fire, sewer, water, or transportation.

## **Need**

The Town of San Anselmo recognizes the importance of an educated and motivated workforce with regards to meeting the organization's objectives. DEI Awareness Training is one tool among many that will allow for employees to recognize, respect and value the differences that lead to innovative approaches and diverse thought. The Town of San Anselmo requests proposals from consultant firms, non-profits, and other organizations with expertise in providing professional consulting services in the area of diversity, equity and inclusion. The Town of San Anselmo is seeking the development of a town-wide Diversity, Equity and Inclusion (DEI) training program for our employees. This program would include policy development, employee training, and providing the Town of San Anselmo with a framework to carry forward this work. The training would include, but not be limited to, issues of socioeconomic status, implicit bias, micro-aggressions, ability, physical differences, religion, gender, LGBTQIA, race, language and ethnicity. Along with the DEI Awareness Training proposal, Town of San Anselmo would also like a proposal to conduct an organization-wide racial equity audit of the organization's internal documents, data, policies, and external communications as they reflect and/or pertain to Town of San Anselmo's goal to eliminate institutional bias and disparities.

The Town's Racial Equity Ad Hoc Committee in consultation with staff will oversee the audit process.

## **Project Overview**

Town of San Anselmo is seeking to create and implement both internal and external policies for a comprehensive commitment to diversity, equity, and inclusion in our organizational practices. We are seeking consultant services in developing and implementing these policies and practices. Town of San Anselmo will look to the consultant for specific recommendations on the best way to determine development and implementation, including providing the initial training, leading to the completion of this program. In this RFP, Town of San Anselmo has outlined the scope of services we anticipate will lead us to the creation of a viable program; however, we are open to proposals for alternative/additional scope of services, provided a detailed explanation is given for deviations from this RFP as written. Town of San Anselmo is looking forward to the professional guidance and recommendations from the organization selected to help with this process.

## **Scope of Services and Desired Outcomes**

### **1. DEI Program**

#### **Assessment:**

In conjunction with designated town staff, assess Town of San Anselmo's culture to determine employee and management competencies in the areas of DEI. Evaluate opportunities and challenges using this assessment and use it as the basis to develop program and training recommendations.

#### **Data Analysis:**

Provide aid in reviewing and interpreting available demographic data for Town of San Anselmo in relation to our workforce and communities we serve. Review data on services provided by Town of San Anselmo to understand whether Town of San Anselmo appropriately serves and regulates our

citizens, businesses and visitors. Recommend additional data that could be developed to inform Town practices moving forward.

**Policy and Document Review:**

Review existing Town-wide and Departmental-specific documents and policies and procedures with a DEI lens and make recommendations for updates or creation of new ones. Review community and elected official involvement in and participation in Town activities and make recommendations to ensure Town activities align with community goals. Review Town housing and employment data and Town land use policies to recommend policy options to create a diverse, vibrant community. Document review must include entire Municipal Code, individual department policies, recreation mailers, General Plan and other plans, program fliers/promotional materials, and all Town newsletters.

Town housing review must include information to inform 2023-2031 General Plan Housing Element:

- **Identification and Analysis of Patterns and Trends:** Identify the conditions using either narration, data tables, maps or a combination of all three. The identification of conditions should spatially describe concentrations of all the assessment of fair housing components (e.g., fair housing enforcement and outreach, integration and segregation, racially or ethnically concentrated areas of poverty, disparities in access to opportunity, and disproportionate housing needs including displacement risk). The analysis must address patterns at a regional and local level and trends in patterns over time. At minimum, the analysis should compare patterns from the most recent 5-Year American Community Survey and the prior 10-year census and could address trends over longer periods of time. The analysis should also examine differences in housing tenure (ownership vs. rental) among members of protected classes.
- **Local Data and Knowledge:** In addition to using federal or state level data sources, use local data and knowledge to analyze local fair housing issues, including information obtained through community participation or consultation, such as narrative descriptions of people's lived experiences.
- **Other Relevant Factors:** A discussion of other relevant factors to evaluate patterns and trends, policies and practices, and other factors that lead to fair housing conditions, such as barriers in zoning and land use rules, information about past redlining/greenlining, patterns of institutionalization, restrictive covenants and other discriminatory practices, mobility option patterns, and outreach and community engagement. Demographic trends can include population growth, age, housing tenure by protected characteristics, race, educational attainment, rates of homelessness, construction, and rent and sales prices. Policies and practices should include governmental barriers or lack of action, preservation of housing and development of new affordable housing, and addressing the needs of renters and unhoused or unstably housed people. Other useful information could be the location and type of publicly assisted housing, such as housing financed with federal, state, and local financing and trends related to housing choice vouchers.
- **Conclusions and Summary of Issues:** A complete assessment identifying and summarizing key issues to better identify and prioritize contributing factors to fair housing issues. The analysis

will point to the clearest fair housing issue trends and patterns both within the jurisdiction and in comparison to the region and will highlight the primary practices and other factors that have led to current conditions.

- Identification of policies and schedule of actions and prioritization of contributing factors to fair housing issues based on all the analysis, giving highest priority to factors that limit or deny fair housing choice or access to opportunity or negatively impact fair housing or civil rights. A clear action program to not only address, but overcome and undo, the identified fair housing issues.

2. DEI Training, in person or virtual, in English language.

## **Recommendations**

Development of recommendation(s) for a comprehensive DEI program for the Town, which we expect to include components of in-person and online training for all staff and elected officials. The Town also seeks recommendations for training opportunities for Committees and Commissions. We expect that in-person staff and elected official training would be approximately four hours in length with an online component of approximately 1.5 hours but are open to recommendations. Recommendations should address how to build stakeholder and community engagement processes into our work and ensure that each of our steps and actions include an element of capacity building.

Other components to include:

- Conduct outreach to and communication with key community partners on issues related to diversity, equity and inclusion (DEI). Communicate findings both positive and negative, and need for adjustments to approach and operations, to citizens through Committees, Commissions, and other civic and neighborhood partners.
- Recommend any external citizen/community-oriented DEI activities needed to complement and enhance Town of San Anselmo work.
- The Consultant would provide the first sessions of training for Town of San Anselmo staff with a goal of training internal employees to conduct future sessions.

## **Program Structure**

We expect the proposed program to address, at a minimum, the following elements:

- DEI lenses addressing socioeconomic status, implicit bias, gender, LGBTQIA, race, language, ethnicity, and religion;
- Town -wide housing, transportation and economic issues/policies influencing community diversity;
- Community recreation and other program development and delivery;
- Contractor and consultant selection;
- Identification of internal systems to support integration and continued growth of DEI culture within Town of San Anselmo post-training.

- Development and implementation of strategies to increase workforce and committee diversity (e.g., recruitment and interviewing processes, retention strategies, professional development, etc.). Development of internal programs and external communication strategies to inform diverse populations of the Town 's activities and invite them to participate.

## **Integration**

Recommendations and/or suggestions on ways to integrate and expand the program into one that is outward facing and addressing the DEI needs of our patrons, community partners and the diverse populations we serve. Aim to build stakeholder and community engagement processes into the work and ensure that each of our steps and actions include an element of capacity building.

- Conduct outreach to and communication with key community partners on issues related to diversity, equity and inclusion (DEI). Communicate findings both positive and negative, and need for adjustments to approach and operations, to citizens thru NA's CAB's and other civic and neighborhood partners.
- Recommend Town - wide DEI activities needed to coordinate with Town of San Anselmo efforts
- Consider the formation of a Diversity Advisory Council, which would be appointed by Town Council, and consist of community members, and Town staff. The DAC would work to meet the diversity and human rights goals established by Town Council and the needs of the Town, both as a municipality and as a community.

## **Evaluation**

Recommendations and implementation of methods to evaluate program success, including post-training cultural survey and final report on project. Recommendations on steps needed to ensure the program is a part of Town culture for the long term.

### **3. Equity Audit**

The racial equity audit would include a review of existing policies and written documents regarding program and services information and evaluation, human resource policies and procedures, process for selecting contractors and consultants, Town of San Anselmo website, and other pertinent documents in order to develop a more comprehensive picture of the organizational climate in relation to its goal of racial equity.

Once material is collected and analyzed, the consultants will prepare a detailed summary report, including but not limited to an analysis outlining key themes, recommendations for incorporating action steps into administrative and programmatic areas, and a recommendation for racial equity programs of similar organizations.

This work may be completed before or during the DEI program development, as recommended by the consultant. Audit elements are expected to include, at a minimum:

- Assessments of written and unwritten programs, policies, structures, practices, and culture resulting in qualitative and quantitative data regarding the current work and workplace of Town of San Anselmo, as well as stakeholder perspectives and expectations for future organizational culture change in relation to racial equity programming and practice.
- A comprehensive written report of the audit detailing its process, key themes, analysis of the gaps and disconnects between the current and future/desired state of the organization, and opportunities to build upon. The report should include recommendations for embedding new inclusive policies and practices into the organization’s culture and into all function areas (as noted earlier) of Town of San Anselmo, including achievable short-term action steps and sustainable, long-term goals.
- A field scan of complementary efforts done by other cities and municipalities.

Draft RFP Schedule for DEI Program and Equity Audit September 2021 RFP released. Last day for submittal of questions, September 17, 2021. Answers to all questions received will be made available on Town’s website by September 24, 2021.

<b>Proposal Review &amp; Selection Schedule</b>	<b>Date</b>
Issue Request for Proposals	September 1, 2021
Deadline for Proposal Submission	October 6, 2021
Interviews	October 19-22, 2021
Final Selection and Notification	October 25, 2021
Contract Execution (subject to Council approval)	November 15, 2021

Completion date: Town of San Anselmo desires this work to be done as quickly as possible and hopes to have the audit and the training underway by January 2022. Town of San Anselmo welcomes alternative timelines for completion of work elements proposed by applicants. This project is a priority for the Town and under the direction of the Town Manager, Town departments will make every effort to support consultant work by providing expedited access to relevant staff, resources, and information.

### **Proposal Instructions**

The proposal should include the following and should include a concise description (no longer than 10 pages) of the following elements:

- A work plan describing methodologies, approaches, and roles and responsibilities for how the work will be accomplished
  - Detailed description of deliverables and outcomes

- Travel and related expenses
- Timeline
- Estimated costs and cost methodology
- Experience providing consulting services, including audits or assessments related to racial equity/diversity/inclusion/cultural competency and experience working for government agencies
- Experience and philosophy regarding your work as part of a multicultural/multiracial team
- Professional training and short bios of the proposed project team members clearly outlining their roles in the proposed work
- A sample list of past and current clients
- Contact information for a minimum of 3 relevant references

Additional pages may be provided for more details on the above, but an overview of the proposal must be clearly available in a concise form.

### **Selection Process**

Consultants will be considered based on a 100-point scale:

- Consultant's experience in the field of DEI analysis, training and implementation; (10)
- Prior relevant projects or experience in organizations of similar or greater size; (20)
- Previous civic or governmental work experience; (5)
- Knowledge and expertise of individuals that will work on the projects; (10) 6
- Readiness, availability, and familiarity with the area; (20)
- A proven track record of providing quality work on time; (15)
- Meets all applicable licensing requirements including a valid business license; (5) and
- Response of references. (15) TOWN OF SAN ANSELMO Administration will perform technical evaluations, rank submittals, and make selection recommendations. TOWN OF SAN ANSELMO Administration will evaluate proposals and may ask a short list of consultants to participate in an interview process. All Consultants submitting a proposal will be notified of TOWN OF SAN ANSELMO's final selection decisions.

Submittal Contact Information Proposals shall be submitted electronically in .pdf format to Assistant Town Manager Linda Meneses Kenton: [lkenton@townofsananselmo.org](mailto:lkenton@townofsananselmo.org). Any questions regarding this proposal should also be directed to Linda Meneses Kenton at the above email address.