



**REQUEST FOR PROPOSAL NO. US2512**  
**GLOBAL EQUITY ASSESSMENT**

**CATHOLIC RELIEF SERVICES – UNITED STATES CONFERENCE OF CATHOLIC BISHOPS**

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**BALTIMORE, MARYLAND**

# INVITATION TO PARTICIPATE

June 9, 2021

Dear Prospective Bidders:

Your company is invited to participate in this Request for Proposal (RFP) for a Global Equity Assessment. Catholic Relief Services – United States Conference of Catholic Bishops (CRS) is requesting a proposal from potential suppliers to evaluate experiences with similar clients, creative ideas, and your strategic and tactical approach to conducting a Global Equity Assessment of CRS.

As the Procurement professional responsible for facilitating this process, the rules of engagement are for you to contact me via e-mail at [Regina.Hill@crs.org](mailto:Regina.Hill@crs.org), with CC to [FY20RFPMail@crs.org](mailto:FY20RFPMail@crs.org).

CRS will accept questions through 11:59 p.m. on Wednesday, June 16, 2021. Interested Bidders can submit their questions to the email addresses above. CRS will provide answers to all relevant questions by email, to all known participants.

Please refrain from communicating with other staff of CRS in regard to this RFP. Any communication outside of this process may result in disqualification. Please follow the instructions provided and the timeline in this document for RFP due dates and requirements. CRS looks forward to working with you throughout the RFP process.

Sincerely,

Regina Hill  
RFP Committee Management





## **Request for Proposal Timeline**

RFP No.:	US2512 Equity Assessment
For the Procurement of:	DEI Audit
Funded By:	Catholic Relief Services
Launch Date:	June 10, 2021
Vendor Intention to Bid:	June 16, 2021 12 P.M. EDT
Vendor Clarification Questions to CRS:	June 16, 2021, 11:59 p.m. EDT
CRS Response to Vendor Clarification Questions:	June 22, 2021
Bid Due Date:	July 7, 2021, 11:59 p.m. EDT
Vendor Down Selection and Invite to Present:	July 8 – 14, 2021
ANTICIPATED CONTRACT START DATE:	TO BE DETERMINED

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## **ORGANIZATION OVERVIEW AND BACKGROUND**

Catholic Relief Services – United States Conference of Catholic Bishops (CRS) was founded in 1943, and is the official international humanitarian aid agency of the U.S. Catholic community. Since then, CRS has expanded in size to reach more than 130 million people in more than 100 countries on five continents.

For over 75 years, our mission has been to assist impoverished and disadvantaged people overseas, working in the spirit of Catholic social teaching to promote the sacredness of human life and the dignity of the human person. Although our mission is rooted in the mission of the Catholic Church, our operations serve people based solely on need, not creed, their race, religion, nationality, or ethnicity.

CRS works with local, national and international Catholic institutions and structures, as well as governments and secular organizations. Within the United States, CRS engages Catholics to live their faith in solidarity with the disadvantaged people of the world. CRS also works throughout the United States to offer Catholics at home concrete ways to contribute to the progress of the world by helping the poorest and most vulnerable overseas.

We put our faith into action to help the world's poorest people create lasting change. Guided by the belief that we are all one human family, CRS invites you to witness what together can do.

## **SECTION 1. STATEMENT OF WORK**

This RFP and the submission of the proposal do not create any obligation upon CRS to buy goods or services from Bidder, or to enter any negotiations, or binding legal relationships with any bidder.

### **1. PURPOSE**

While we boast a diverse staff population overall, like many INGOs and non-profit organizations, that diversity tends to lessen as the job grade increases. Moreover, we have spent the last 16 months listening to staff express their DEI-related concerns via an agency-wide survey, DEI working groups on race equity and safeguarding, our internal social media platforms and over a dozen virtual listen & learn sessions including staff from each of our seven regions outside of the US. From these, we have learned that there are several DEI-related issues and gaps present across our regions related to traits such as race/ethnicity, expatriate status, and gender to name a few. In addition, CRS hired its first Senior Director for Global Diversity, Equity, and Inclusion in late 2020 to lead the design and implementation of an agency wide initiative to address these issues. Since that time, we have launched our Respect, Equity, Diversity, and Inclusion (REDI) initiative, which aims to ensure that all CRS staff are able to fully participate in and contribute to the agency no matter their personal identity.

CRS is launching this RFP to solicit proposals for a global equity and diversity assessment. The vendor selected through this RFP will be expected to manage the project as outlined within this document.

### **2. OBJECTIVES**

As one of our eight REDI Priority Actions for FY21 (October 1 - September 30), CRS is to have a third-party vendor conduct a Global Equity Assessment focused on:

- 1. Workforce Equity Assessment**
  - a. Diversity, employee life cycle, talent/ recruitment and representation.
- 2. Workplace Equity Assessment**
  - a. Culture, engagement, inclusion and colleague voices
- 3. Equity Analysis** of agency-wide policies, processes, and practices related to the people cycle (recruiting, hiring, performance management, staff development, transfers, and promotions).
- 4. Optional Scope**
  - a. **Risk assessment of total rewards program** across staff categories of US-based, expatriate and locally-hired staff.

Given the large number of CRS worldwide offices, the scope of this audit would focus on the policies, processes, and practices applicable to all staff regardless of location or status (expatriate, national, and U.S.). In addition, CRS is requesting analysis for these unique

elements within the largest country program/office in each of our seven regions located across Latin America and the Caribbean, Africa, Eastern Europe and the Middle East, Asia, and the Pacific Islands.

### 3. SCOPE OF WORK AND DELIVERABLES

The vendor will be responsible for developing and completing the following tasks.

1. **Workforce assessment report** of key findings with recommendations to inform multi-year strategy. Report specifications:
  - 1) All staff job/grade data:
    - a) Dimensions: gender, age, tenure; national origin.
    - b) Reporting by: all staff, region
  - 2) US-based/Expatriate staff job/grade data:
    - a) Dimensions: gender, age, tenure, national origin, race, disability, veteran status.
    - b) Reporting by: all US/Expats, department-region.
  - 3) Specific Jobs for Analysis:
    - a) Country Representative, Head of Operations, Head of Programming, Chief of Party, Finance Manager.
    - b) Dimensions: Gender, tenure, age, whether expatriate or local staff
2. **Workplace culture and engagement assessment report** of key findings with recommendations to inform multi-year strategy. As appropriate, this would draw from March 2021 agency-wide engagement survey results, notes from listening sessions (1,500+ colleagues, November 2020-February 2021) and REDI leadership behavior assessments June-July 2021. As recommended by the vendor, this would include additional key stakeholder interviews, online surveys with select groups of staff, and/or focus groups.
3. **Policies, processes, and practices assessment report** including key findings with recommendations to inform multi-year strategy regarding **employee life cycle** (recruitment, onboarding, performance management, development, transfers and promotions) to determine the most significant areas of inequity among staff: demographic considerations would include gender, tenure, national origin.
  - a. Agency-level policies (applicable to all employees with special attention to differences between expatriate/US staff and locally hired staff).
  - b. Data from seven countries programs--one for each of seven regions indicating equity opportunities for local staff vs. expatriate staff.
  - c. US/expatriate staff by race/ethnicity, individuals with disabilities.
4. Assessment summary of the findings along with subsequent recommendations and guidance, which will be used to create of our multi-year DEI strategy.
5. **Facilitate at least one virtual presentation** on findings and recommendations to the core REDI Team and Executive Sponsors along with CRS' Executive Leadership.

6. **Develop an Executive Summary and detailed findings report** with recommendations for next steps and proposed metrics.

#### **4. TENTATIVE DELIVERABLES TIMELINE**

CRS anticipates awarding one contract for the requested services in July 2021.

<b>Deliverable</b>	<b>Estimated Dates</b>	<b>Payment Schedule</b>
Workforce Assessment Report	September, 2021	Invoices will be submitted at the completion of each deliverable. CRS is net 30 upon approval of submitted deliverable and receipt of invoice.
Workplace Assessment Report	September, 2021	
Policy, Process, Practices Equity Assessment Report	September, 2021	
One-day strategy discussion on key recommendations	October 15, 2021	

#### **5. ADDITIONAL TERMS**

The winning bidder will be responsible for translating reports and materials into CRS' four official languages as needed: English, Arabic, Spanish, and French (additional languages may be needed depending on the location). This also includes providing speech translation for virtual meetings and phone calls (i.e., interpreter or subtitles in different languages).

1. In countries where CRS is not legally allowed to collect data on staff race, ethnicity, or tribal affiliation, we substitute that information with nationality data during internal reviews.
2. As a Catholic-affiliated organization, CRS does not ask staff questions about their sexual orientation or gender identity. In addition, we do not offer artificial contraceptive benefits to women or spousal benefits to staff in same-sex unions or who are cohabitating. We ask that the vendor for this project also respect these parameters during the auditing process.



## **SECTION 2. BID PROCESS AND EVALUATION CRITERIA**

### **6. QUESTIONS AND ANSWERS**

CRS will accept questions submitted through email for further clarification of the RFP document and to ensure that there is a clear and concise understanding of the requirements. All questions should be submitted to the sole point of contact for this RFP:

Regina Hill, regina.hill@crs.org, with CC to FY20RFPMail@crs.org.

**Questions must be received by 11:59 p.m. on Wednesday, June 16, 2021.**

### **7. AWARD PROCESS**

#### **Method of Evaluation**

Each bid will be evaluated by a CRS Bid Committee. A Contract will be executed with the Bidder whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this RFP, meets the technical, management/personnel, and corporate capability requirements, and is determined to represent the best value to CRS.

#### **Evaluation Criteria**

This RFP will use a three-stage evaluation process to determine best value.

The Technical Evaluation Score will be weighted at 50% and the Total Cost Evaluation Score will be weighted at 50%. The total score will be determined by combining the weighted scores for the Technical and Cost Proposals. The firm with the highest total score shall be awarded the contract. Each proposal will be evaluated and scored against the following criteria.

#### **Stage 1: General Evaluation (Pass/Fail)**

The General Evaluation will determine if an offer meets CRS standard criteria and is able to provide the requested goods and/or services. Those vendors who pass Stage 1 will be eligible for consideration in Stage 2.

Factors taken into consideration include:

- a. Background information provided in Supplier Questionnaire.
- b. Financial and legal standing.
- c. Completeness of submission to include requested documentation.

#### **Stage 2: Technical Evaluation – 100 points**

##### **1. Functional Fit**

- a. The extent to which the bidder's offer meets or exceeds CRS' functional requirements.

##### **2. Technical Fit**

- a. The extent to which the bidder's offer meets or exceeds CRS' technical requirements.
- 3. Implementation Methodology
  - a. The extent to which bidder's proposed implementation plan minimizes CRS risk.
  - b. Feasibility of completing the implementation plan within proposed cost and schedule.

### **Stage 3: Total Cost Evaluation – 100 points**

Cost proposals from bidders that have successfully passed Stage Two of the evaluation process will be evaluated. The lowest cost proposal will receive the full 100 points.

Pricing will be a significant component of the evaluation and vendors should focus on offering competitive pricing. All financial information must be expressed in USD.

### **Award Recommendation**

Bidders are cautioned to propose the best possible offer at the outset of the process, as there is no guarantee that any bidder will be allowed an opportunity to submit a Best and Final Offer.

## **SECTION 3. PROPOSAL DETAILS, REQUIREMENTS, AND INSTRUCTIONS**

Bidders will be required to submit their proposals in two documents, the technical proposal and a separate cost proposal. All proposals must be signed and valid for a minimum of sixty (60) days.

Proposals must be submitted electronically by the time and date specified in this document. Your proposal should provide basic information about your Company/Individual and relevant service offerings. Complete proposals should not exceed 65 pages.

### **8. COMPLETE PROPOSAL**

To be considered responsive, a complete proposal addressing the specifications of this RFP is required. Each proposal should be prepared simply and economically, providing a straight forward, concise description of the Bidder's ability to meet the requirements of the RFP.

#### **TECHNICAL PROPOSAL**

The technical proposal shall comprise the following parts:

**Part 1:** Technical Approach, Methodology and Detailed Work Plan.

**Part 2:** Management and Key Personnel. CVs for key personnel may be requested in a later phase of the RFP.

**Part 3:** Corporate Capabilities, Experience, and Past Performance.

Part 3 must include a description of the company or organization, with appropriate reference to any parent company and subsidiaries. Bidders must include details demonstrating their experience and technical ability in implementing the technical approach/methodology and the detailed work plan.

The sections of the technical proposal stated above must respond to the detailed information set out in the Statement of Work portion of this RFP, which provides the background, describes the deliverables, and provides a tentative deliverables schedule.

#### **FINANCIAL PROPOSAL**

The financial proposal is used to determine which proposals represent the best value and serves as a basis of negotiation before award of a contract. The financial proposal will include all costs associated with the technical proposal with the exception of travel-related costs or expenses.

If possible, please offer pricing for the individual components of Section 2. Objectives.

Bidder pricing must represent the totality of charges that will be incurred by CRS (i.e., CRS will only be obligated to pay those fees and charges)

The financial proposal shall also include a budget narrative that explains the basis for the estimate. Supporting information must be provided in sufficient detail to allow for a complete analysis. CRS reserves the right to request additional financial information if the evaluation committee has concerns of the reasonableness, realism, or completeness of a Bidder's proposed cost. All financial information must be expressed in USD.

If it is a Bidder's regular practice to budget indirect rates, e.g. overhead, fringe, G&A, administrative, or other rate(s), Bidders must explain the rates and the rates' base of application in the budget narrative. CRS reserves the right to request additional information to substantiate a Bidder's indirect rates.

No financial information or project pricing, whether for deliverables or line items, should be included in the technical proposal.

### **BIDDER CORPORATE SUMMARY**

1. Detailed documentation demonstrating experiences and capabilities providing Diversity, Equity, and Inclusion services for a global organization.
2. Detailed information related to transformation and implementation of DEI standards and practices. Also include the below request information.
  - i. Total number of personnel in 2019
  - ii. Industry awards and recognition
  - iii. Number of DEI personnel worldwide in 2019
  - iv. Average years of experience in DEI transformation and integration

### **REQUIRED ANNEX FORMS**

1. Proposal Response Form (Annex A).
2. Bidder Questionnaire (Annex C).
3. Detailed Company Information (Annex D).
4. Terms and Conditions (Annex E).
5. Business Verification (Annex G).
6. Relationship Disclosure (Annex H).

### **SUBMITTING BIDS AND PROPOSALS**

#### **Bid Receipt**

Once a bid is submitted, it cannot be modified. Proposals that are received after the specified due date and time cannot be considered unless (a) all other bids received on time do not meet specifications, or (b) no other bids are received.

## VALIDITY PERIOD

As previously stated, proposals must remain valid for a period of 60 days following submission. If a bidder decides to withdraw during the Validity Period the bidder is asked to notify CRS by emailing [regina.hill@crs.org](mailto:regina.hill@crs.org).

## Important RFP Dates

Launch Date	June 10, 2021
RFP Q & A Period	June 17 – June 22, 2021
Complete Proposal Packet to CRS <a href="mailto:Regina.Hill@crs.org">Regina.Hill@crs.org</a> , Cc <a href="mailto:FY20RFPMail@crs.org">FY20RFPMail@crs.org</a>	July 7, 2021, 11:59 pm EDT

REMAINDER OF PAY INTENTIONALLY BLANK

## **ANNEX A**

### **PROPOSAL RESPONSE FORM**

Submitted by:

The undersigned hereby submits the attached proposal for PO #US2512 Global Equity Assessment.

Authorized Name and Title:

Authorized Signature:

Witness Name and Signature:

## **ANNEX B**

### **FINANCIAL PROPOSAL**

Please ensure pricing quoted is comprehensive and includes all reasonable business expenses that may be incurred in the completion of project objectives.

Indicate whether the cost is a one-time or recurring charge.

- I. Items may include, but are not limited to those listed below.
  - a. Cost element (e.g., license fee, hosting fee, configuration support)
  - b. Cost category (Fixed, Time and Materials)
  - c. Customization and Reporting
  - d. Total Cost
  - e. Amount of total cost that constitutes a one-time cost
  - f. Ongoing support, communication, consulting hours, time differential
- II. Explanation of Financial Proposal.

Identify the basis of offering, any critical assumptions, implied service levels, restrictions on raising or reducing need for interaction with CRS Staff and data sharing, and any application of non-profit discounts.

## ANNEX C

### BIDDER QUESTIONNAIRE FORM

Completed table is required with Bidders official proposal.

REQUESTED INFORMATION	BIDDER RESPONSE
Legal Company Name	
Address	
Telephone No. and Email Address	
Website	
Name of Contact Person	
Title of Contact Person	
Billing Address	
Tax Registration or equivalent document	
DUNS Number	
Parent Company (if applicable)	
Parent Company Address	
Subsidiaries, Associates, Associations, Overseas Representatives	
Type of Business (corporation, partnership, sole proprietorship, etc.)	
Within the last three years, has administrative, civil or criminal litigation been filed or pursued in any country against your Company? If yes, provide specific details.	
Three references with a similar scope of services as requested in the RFP.	Client Name, Email, Phone Number, Business Address



## ANNEX D

### DETAILED COMPANY INFORMATION

Submitted by (Name):

Please insert your responses within questions A through E below. The pages will expand as needed to fit your responses.

1. **Prior Experience/Brief Background:** Provide brief background of the company and indicate the prior experience of the company. (No more than five pages.)
2. **Unsuccessful Performance:** Please describe an unsuccessful performance for a client. (No more than 2 pages.)
3. **Location Work Plan:** Provide a detailed plan on how you intend to service the contract regarding the following:
  - a. Implementation Phase: What will be the initial setup to start or kick-off the project?
  - b. Contingency Phase: What are your contingency plans and how do you plan to carry them out if any unforeseen circumstance arise that can cause disruption in the service (e.g., pandemic, employee absence, travel disruption, platform/communication/equipment failure)?

## **ANNEX E**

### **TERMS AND CONDITIONS**

Attachment I presents the Terms & Conditions ("T&Cs") which CRS considers to be essential and relevant to the contractual relationship between the parties. Bidders are expected to familiarize themselves with these T&Cs and be prepared to be governed by them in substantially the form presented here. In submitting a proposal, a vendor who desires to request an exception to these T&Cs and/or desires to propose an alternative approach to a particular provision should identify such provision(s) and explain the rationale for the exception or alternative. Additionally, should the Bidder propose to use a form contract adapted to its particular goods or services which substantially conforms to the T&Cs presented here, that form contract should be submitted as part of the Bidder's Bid Package as Annex C.

#### **Terms and Conditions Acceptance**

I hereby accept and agree to the Terms and Conditions of this Request for Proposal for Website Design and Launch to be carried out for Catholic Relief Services, located at 228 W. Lexington St., Baltimore, MD. 21201.

Name and Title of authorized respondent:

Signature:

Date:

## **ANNEX F CRS CODES**

### **1. CRS SUPPLIER AND PROVIDER CODE OF CONDUCT**

The Supplier or Service Provider agrees to adhere to the requirements laid out in the Supplier and Service Provider Code of Conduct:

[https://www.crs.org/sites/default/files/supplier\\_code\\_of\\_conduct.pdf](https://www.crs.org/sites/default/files/supplier_code_of_conduct.pdf)

### **2. STANDARD TERMS AND CONDITIONS**

Catholic Relief Services' Standard Terms and Conditions can be found at <http://crs.org/vendor-terms/vendor-terms.pdf>, or obtained from CRS upon request, and are binding as applicable under local law.

## **ANNEX G – BUSINESS VERIFICATION**

### **SUPPLIER FINANCIAL REVIEW, BUSINESS REGISTRATION, ACCOUNT REPRESENTATION**

- A. Please submit the latest audited financial statements as indicated below. (Include audit opinion and footnotes to the financial statements.)
- ☐ Income Sheet, or Profit & Loss Statement
  - ☐ Cashflow Statement
  - ☐ Balance Sheet
  - ☐ Bank Letter (indicating years as a client, type of accounts)
- B. State whether the firm is a local, national, or an international firm. Indicate Global presence or international reach. Is company privately held or publicly traded?
- C. Describe the local office and the team that would be assigned to CRS. Include an organizational chart relevant to the team being proposed and identify the first point of contact for CRS.

## **ATTACHMENT H**

### **RELATIONSHIP DISCLOSURE**

Describe any current or past relationships your organization may have with CRS, and if it is a potential conflict of interest. If there is a potential conflict of interest, please explain how this risk will be mitigated.

Describe any personal or familial relationships any employee of the Contractor has with any employee of CRS. If there is a relationship, please explain how any conflict of interest risk will be mitigated.

Describe any personal relationships you have with CRS or employees of CRS.

All bidder team members must complete this form.

#### **Consultant:**

By: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_