Main Phone 828-438-6255
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Alexander, Burke, Caldwell, Catawba,
Gaston, Mecklenburg, Rutherford, Stanly, Union

Request for Proposal (RFP)
Organizational Culture Assessment

Blue Ridge Community Action, Inc. (BRCA) invites you to submit a proposal for an organizational culture assessment for our agency. Information about our agency, project and scope of services are provided herein.

Responses Due: Final RFP is due October 31, 2023

RFP Contact:

Stephanie Ashley, Executive Director
Blue Ridge Community Action, Inc.
800 Green Street, Morganton, NC 28655
sashley@brcainc.org
828-438-6255

Questions regarding this RFP should be submitted to Stephanie Ashley by Friday, October 20, 2023, using the subject line: "Organizational Culture Assessment Inquiry." No phone calls.

Confidentiality: All information contained in this RFP is confidential and may not be disclosed, published, or advertised in any manner without written authorization from Blue Ridge Community Action Inc. All RFP documents remain the property of Blue Ridge Community Action, Inc. Vendors who do not honor these confidentiality provisions will be excluded from participating in this and future opportunities.

Note: The fee proposal and all costs related to the submission of this RFP must be separate from the rest of the proposal on a single page.

Contents

Introduction.....3

Timeline.....4

Company Profile.....4

Required Services and Capabilities 5

Proposal Requirements.....6

Evaluation Guidelines…….7

Attachments……..……8

Introduction

BRCA strives to embody the values of intentionality, collaboration, consistency, transparency, and stewardship. We value providing a supportive environment and ample resources for our hardworking staff that makes everyone proud to be part of the BRCA family. We seek the services of a consultant/firm for an onsite evaluation/assessment that can assist us in identifying and leveraging our strengths, acknowledging and addressing our weaknesses, and bolstering our internal practices and communications.

Notwithstanding any other provisions of this RFP, BRCA reserves the right to award this contract to the consultant/firm that best meets the requirements of the RFP and not necessarily the lowest-cost proposer. Further, BRCA reserves the right to reject any or all bids, to award in whole or in part, and to waive minor immaterial defects in bids. BRCA may consider, at its sole discretion, any alternative bid.

Negotiations may include all aspects of services and fees. After a review of the proposals and potential interviews, BRCA intends to enter contract negotiations with the selected consultant/firm. If a contract with the selected consultant/firm is not finalized within 90 days, BRCA reserves the right to open negotiations with another consultant/firm.

The selected consultant/firm shall be required to enter into a written contract with BRCA. This RFP and the proposal, or any part thereof, may be incorporated into and made a part of the final contract. BRCA reserves the right to negotiate the terms and conditions of the contract with the selected proposer.

Timeline

Please note the following deadlines for this RFP:

The proposal must state the period for which the proposal shall remain in effect. Such period shall not be less than 90 days from the proposal date.

Date	Content
October 20, 2023	Please confirm with Stephanie Ashley receipt of this RFP and intent to bid no later than 5:00 pm on Friday, October 20, 2023.
October 20, 2023	Please submit any questions you have regarding this RFP no later than 5:00 pm on Friday, October 20, 2023. Questions should be submitted via email to Stephanie Ashley (sashley@brcainc.org) using the subject line: "Cultural Assessment RFP Submission."
October 31, 2023	Final responses are due no later than 5pm on Tuesday, October 31, 2023. Please submit an electronic copy in PDF format of your responses to Stephanie Ashley (sashley@brcainc.org), using the subject line: "Cultural Assessment RFP Submission."
	From the respondents, BRCA may invite selected consultants/firms to interview with the HR Committee Team at a time TBD in BRCA office in Morganton, NC or virtually based on location.
	The HR Committee Team will select the firm that best serves the mission, vison, and needs of BRCA. If the HR committee does not select a firm from the September 2023 RFP another RFP will run again in January of 2024.
Mid November	Successful bidding consultant/firm will be notified. All candidates will be informed of a decision by mid-November 2023. Engagement will begin upon signing a final contract.

Company Profile

Blue Ridge Community Action, Inc. (BRCA) is a private, non-profit organization founded in 1965 to address problems related to poverty in Burke, Caldwell, and Rutherford counties. The BRCA mission statement, "Helping People. Changing Lives." embodies the spirit of hope, improves communities, and makes our counties better places to live. We care about the entire community and are dedicated to helping people help themselves and each other. BRCA strives to obtain and maintain agency self-sufficiency and assist employees and low-income residents to obtain and maintain self-sufficiency. Our mission is realized by providing services, advocacy, and support for persons to become economically self-sufficient, improve the quality of their lives, and better provide opportunities for their families.

BRCA is governed by a 15-member tripartite Board of Directors. One-third of the Board represents elected public officials, one-third represents the private sector, and one-third represents low-income communities.

Under the guidance of the local Board, BRCA develops programs and mobilizes resources from federal, state and local governments, private foundations and private financing to expand and/or establish new services benefiting low-income residents. BRCA's primary service counties are Burke, Caldwell and Rutherford,

although limited services are provided to low-income residents of Alexander, Burke, Caldwell, Catawba, Gaston, Mecklenburg, Rutherford, Stanly and Union Counties.
We believe that our employees are our strongest asset, and we strive to create an inclusive, supportive culture that promotes growth. Our employees are the driving force that will solidify our position as a thought leader in the Community Action Network. On average, we have 79 full-time employees. During the pandemic, our doors remained open, and offered remote work when needed to prevent/decrease the spread of COVID. We have had turnover. However, over the past few years, we have seen an increase in turnover due to retirements and staff looking for different opportunities. The agency did not have a formal HR Department for more than 20 years. In 2020, a HR Director was hired but she left after a year due to the rigidness of the culture. The second HR Director was hired in 2021 and is currently working at the agency.

To learn more about BRCA's services and programs, please visit https://www.brcainc.org.

Required Services and Capabilities

In selecting a cultural assessment/human resources consultant/firm, BRCA's primary goal is to partner with an expert consultant/firm that demonstrates quality and responsiveness in its customer service, follows ethical business practices, and shares a passion for BRCA's mission and vision.

The scope of work, which can be divided into multiple phases upon recommendation from the selected consultant/firm, includes assistance with the following components. We welcome proposals that recommend additional or different actions in the interest of promoting a high-quality culture at BRCA.

1. **Conduct an analysis of BRCA's current culture,** including a comprehensive review of BRCA's strengths, weaknesses, current practices, and opportunities for growth with respect to achieving our "ideal" culture. Ideally, this phase will be completed in Fall 2023. Specifically, BRCA sees the need to assess the total employee experience from job posting to exit interview and includes, but is not limited to:
    a. Assess current internal communication, particularly feedback loops.
    b. Assess current benefit offerings.
    c. Assess policies and practices, including but not limited to, reviewing HR Manual and Senior Management job descriptions.
    d. Identify areas for improvement and new opportunities.
    e. Assess, recommend, and help prioritize possible employee engagement and assessment activities.

   Present the analysis results to the Executive Director and Board of Directors, including a risk assessment and priority proposal.

2. **During and after the evaluation process, cooperate with our HR Committee Team to ensure that both projects/initiatives are collaborative and integrate well.** This would be an ongoing/continuous process for one year.

3. **Collaborate with BRCA staff to articulate a clear set of cultural goals, draft an action plan with specific initiatives, and create appropriate outcomes/measures.** We envision that the consultant will help design clear and measurable goals, along with a prioritized action plan that includes a theory of change, accountability, timelines, and detailed descriptions for the initiatives implemented within BRCA to promote any necessary cultural change. Depending on the topic, activities may be designed as

interactive workshops with staff, targeted training, or expert advisory recommendations to improve BRCA's organizational policies and procedures. This phase could be completed in early 2024.

4. **Work with Human Resources and the Executive Director to implement the action plan.** Collaboration primarily with human resources may require various activities, from facilitating discussions to implementing new tools, practices, or policies. This phase would be completed in late 2023 or early 2024.

5. **Provide ongoing advice and support.** We recognize that once the plan is created and implementation begins, additional needs for support may arise. For example, we may identify additional needs for workshops to address pressing topics, or we may identify a specific organizational policy needing an update. Should these needs arise, we would like to rely on the support of a consultant/team familiar with BRCA and our culture. This would be an ongoing/continuing process for one year.

Proposal Requirements

Your proposal should include the following components:

1. **Applicant Information**: Name, address, phone number, web address, email address, contact person and legal status of offeror. Please see attachment A.

2. **Consulting Highlights**: Specifically address how you/your firm can meet BRCA's needs and highlight other successfully completed cultural assessment planning/consulting projects, particularly in the non-profit (preferably private operating foundation) space.

3. **Consultant/Team Bio**: Please include any/all team members who will be involved in the work you will do with BRCA. As an organization that celebrates diversity and inclusion, we look forward to working with firms that bring myriad voices and talent to their solutions.

4. **CONFLICT OF INTEREST DISCLOSURE:** BRCA requires that the consultant/firm complete a Conflict of Interest Disclosure form. A contract may not be awarded to the selected.
offeror unless and until the HR Committee has reviewed the Disclosure form and determined that no conflict exists under applicable federal, state, or local law or administrative regulation. Please see attachment B.

5. **Implementation Process**: Provide a projected plan creation and implementation timeline.

6. **Unique Qualifications**: How do you differ from other consultants/consulting firms, and what advantages can BRCA expect in selecting you/your firm?

7. **Cost**: Provide a proposed fee schedule for the services described in the proposal on a single separate sheet from the proposal.

8. **References:** References from 3 prior clients. References from other non-profit organizations/private foundations are a plus.

9. **Length**: Please limit proposals to 10 pages at maximum.
10. **Clearly Marked**: RFP BRCA Organization Culture Assessment

Evaluation Guidelines

Proposals will be evaluated on the following criteria:

1. The proposal overall fits with the needs of BRCA as expressed above.
2. Consultant/firm's diversity profile and values alignment.
3. Consultant/firm's qualifications, experience, and references.
4. Fees/cost (does not mean the lowest bid will be awarded the contract).
5. Value add/new ideas presented.

ATTACHMENT A
Legal Status of Offeror

(The Respondent shall fill out the provision and strike out the remaining ones.)

The Respondent is:

- A corporation organized and doing business under the laws of the state of _____, for whom bearing the office title of _____, whose signature is affixed to this proposal, is authorized to execute contracts on behalf of respondent. *

  *If not incorporated in North Carolina, please attach the corporation's Certificate of Authority

- A limited liability company doing business under the laws of the State of _____, whom _____ bearing the title of _____ whose signature is affixed to this proposal, is authorized to execute contract on behalf of the LLC.

- A partnership organized under the laws of the State of _____and filed with the County _____, whose members are (attach list including street and mailing address for each.)

- An individual, whose signature with address, is affixed to this RFP.

Respondent has examined the basic requirements of this RFP and its scope of services, including all Addendum (if applicable) and hereby agrees to offer the services as specified in the RFP.

_____ _____
Signature **Date**

(Print) Name: _____

Title: _____

Firm: _____

Address _____

Contact Phone _____ **Fax** _____

Email _____

ATTACHMENT B
Vendor Conflict of Interest Disclosure Form

All vendors interested in conducting business with Blue Ridge Community Action, Inc. must complete and return the Vendor Conflict of Interest Disclosure Form to be eligible to be awarded a contract. Please note that all vendors are subject to comply with BRCA's conflict of interest policies as stated within the certification section below.

If a vendor has a relationship with a BRCA employee, immediate family member, Board of Director Member or Policy Council Member, the vendor shall disclose the information required below.

1. No BRCA employee, BRCA employee, Board of Director Member or Policy Council Member's immediate family member has an ownership interest in vendor's company or is deriving personal financial gain from this contract.
2. No retired or separated employee, Board of Director Member or Policy Council Member who has been retired or separated from BRCA for less than one (1) year has an ownership interest in vendor's Company.
3. No BRCA employee, Board of Director Member or Policy Council Member is contemporaneously employed or prospectively to be employed with the vendor.
4. Vendor hereby declares it has not and will not provide gifts or hospitality of any dollar value or any other gratuities to any BRCA employee, Board of Director Member or Policy Council Member to obtain or maintain a contract.
5. Please note any exceptions below:

Conflict of Interest Disclosure*	
Name of BRCA employee, Board of Director Member, Policy Council Member or immediate family member with whom there may be a potential conflict of interest.	( ) Relationship to employee _____ ( ) Interest in vendor' company ( ) Other (please describe in box below

*Disclosing a potential conflict of interest does not disqualify vendors. In the event vendors do not disclose potential conflicts of interest and they are detected by BRCA, vendor will be exempt from doing business with BRCA.

I certify that this Conflict of Interest Disclosure has been examined by me and that its contents are true and correct to my knowledge and belief and I have the authority to so certify on behalf of the Vendor by my signature below:		
Vendor Name		**Vendor Phone Number**
Signature of Vendor Authorize Representative	**Date**	**Printed Name of Vendor Authorized Representative**