

# Scope of Work (Revised)

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Prepared for:

PATRICK FOILES

HUMAN RESOURCES DIRECTOR

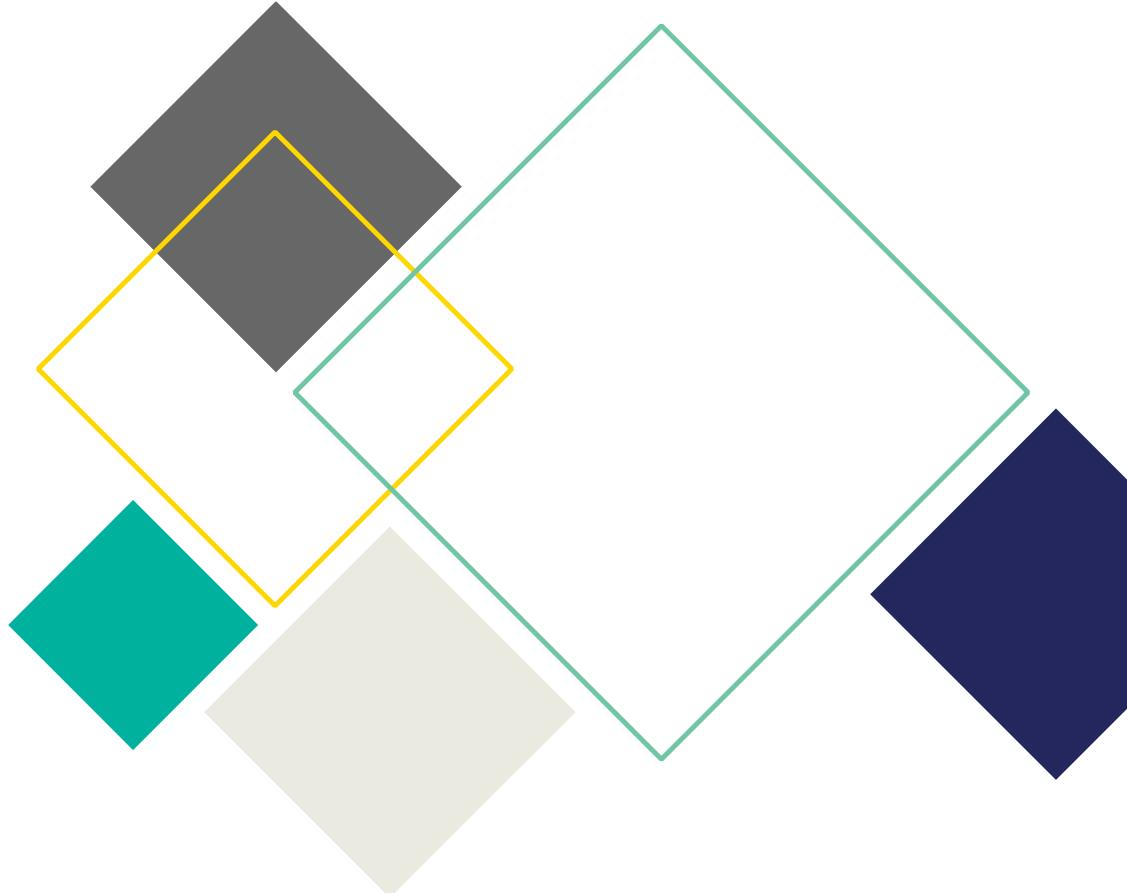
625 Center Street  
Oregon City, OR 97045

503-496-1528  
pfoiles@orccity.org

## Consultant Services for Diversity, Equity, and Inclusion Initiatives

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CITY OF OREGON CITY



# Detailed Work Plan

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## Task 1.0: PROJECT MANAGEMENT & BEST PRACTICES REVIEW

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### 1.1 Project Kickoff

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#### OBJECTIVE

MGT will facilitate an initial meeting for key members of the project team to meet each other, identify desired communication strategy, ensure mutual understanding of the project goals and outcomes, identify potential barriers, and establish consensus regarding activities, timelines, deliverables, and mutual expectations.

#### DELIVERABLES

- ♦ Finalized work plan and project schedule
- ♦ Description of deliverables
- ♦ Identification of key stakeholders, engagement expectations, responsibilities, and project roles
- ♦ Logistics for project management meeting schedule, agenda, and reporting protocols
- ♦ List of potential stakeholders who might advise the project and provide valuable insight

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### 1.2 Client Engagement

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#### OBJECTIVE

MGT prioritizes effective communication with our clients to maximize trust, clarity of project progress and action steps, and ensure timely and successful execution of all components of the project. Regular collaborative engagement in a manner that meets our clients' availability and interest allows mutual certainty that all aspects of our work align with the organization's mission and ultimate goals.

#### DELIVERABLES

- ♦ Facilitation of regular (weekly, bi-weekly, or monthly) meeting agendas and minutes
- ♦ Meeting documents including PowerPoint presentations and related materials
- ♦ Documentation of decisions made, action steps, responsibility matrix, and deadlines

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### 1.3 Best Practices and Peer Review

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#### OBJECTIVES

MGT will conduct thorough research and review of industry-leading best practices and successes and lessons learned regarding DEI initiatives that have been implemented by similar sized organizations and their related strategic plans. This work will help inform the DEI audit and the potential recommendations that will follow.

#### DELIVERABLE(S)

- ♦ Written draft chapter of peer review and industry-leading best practices in DEI initiatives
- ♦ Graphic presentation of DEI best practices

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**2.1 External Stakeholder Outreach Plan**

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**OBJECTIVE**

To maximize awareness of the City's commitment to DEI, build interest and motivation to engage in the City's DEI-related vision and this audit, we will create an external outreach plan to boost meaningful engagement in the audit process. This Stakeholder Outreach Plan will provide a strategic road map for informing the people of Oregon City of the importance of their participation. We will bring a unique perspective and a set of strategies to increase participation and receptivity to this important work.

**DELIVERABLE**

- ◆ Stakeholder Outreach Plan to maximize awareness and motivation for external stakeholders to engage in the feedback portion of the equity audit

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**2.2 External Stakeholder Engagement**

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**OBJECTIVE**

MGT will design and administer a set of protocols aimed at maximizing participation of Oregon City stakeholders to allow us to gain comprehensive and accurate insight of the resident perspective of equity in the City. We will establish no less than 4 engagement channels that participants will be invited to use:

- 1) A phone-accessible voicemail
- 2) An e-mail inbox system (ex. OregonCity\_DEI@mgtconsulting.com)
- 3) Facilitation of four (4) community meetings
  - a. Two (2) in-person session
  - b. Two (2) remote sessions
- 4) Facilitation of two (2) targeted focus group conversations (remote)

Upon completion, we will evaluate all insight collected to ensure representative participation from all stakeholder groups and re-administer with targeted outreach if necessary.

**DELIVERABLES**

- ◆ Community Equity Survey
- ◆ Focus Group Interview Guide
- ◆ Demographic data summary of resident participation
- ◆ Quantitative and Qualitative analysis of feedback results

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**2.3 External DEI Analysis and Summary Report**

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**OBJECTIVE**

Our DEI consultants will analyze all feedback and data to determine strengths, weaknesses, improvement opportunities, and performance trends. We will craft a comprehensive and succinct reader-friendly report that informs the organization of the state of equity with suggested action steps for improvement.

**DELIVERABLES**

- ◆ External Equity Report Summary
- ◆ Initial list of actionable recommendations on how to elevate equity throughout the City of Oregon City

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## Task 3.0: COMMUNITY DEI TASK FORCE

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### 3.1 Community DEI Task Force Development

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#### OBJECTIVE

MGT will consult with organization's leadership to develop a charter and participant list for the DEI Task Force. It is anticipated the scope of Task Force activities will include (at a minimum) education of and discussion amongst Task Force members of DEI concepts, discussion about the impacts of bias and marginalization and crafting recommendations on making the organization a more welcoming and inclusive environment. We will support the design and administration of a recruitment process to ensure that Task Force membership represents the diversity of the organization and its entire community.

#### DELIVERABLES

- ◆ Comprehensive DEI taskforce membership list and signed commitment letters
- ◆ Long-term set of DEI taskforce goals
- ◆ DEI taskforce meeting schedule

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### 3.2 Community DEI Task Force Facilitation

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#### OBJECTIVE

MGT will facilitate Task Force meetings, including meeting planning and logistics, preparation of meeting minutes, and preparation of reports/presentations as needed.

#### DELIVERABLES

- ◆ Task Force meeting materials (e.g., agenda, PPT presentations, minutes, etc.)
- ◆ Coherent set of decisions made, action steps and owners, deadlines, and accountability measures for meetings and action steps

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## Task 4.0: ORGANIZATIONAL ASSESSMENT

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### 4.1 Prioritized Policy and Practice Analysis

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#### OBJECTIVE

MGT will work with the City's project leadership to establish a comprehensive list of data, documents, policies, and practices to be included in the DEI audit. An equity lens will be applied to our analysis of prioritized topics such as

- ◆ Organizational chart
- ◆ Employee and leadership demographics
- ◆ Organization hiring and promotion practices
- ◆ Barriers to recruiting, hiring, and retaining a diverse workforce
- ◆ Internal communications regarding DEI
- ◆ Annual spending and prioritization of DEI initiatives
- ◆ Aspects of the organizational culture where inequities have been unintentionally perpetuated
- ◆ Impact of staff and leadership self-awareness and implicit bias on organizational culture and the employee experience

#### DELIVERABLE(S)

- ◆ Comprehensive set of documents and data points for review and analysis
- ◆ An analysis of existing organizational strengths and gaps with clear recommendations on how to best build upon strengths that will encourage DEI in all areas of the City and community.

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### 4.2 Staff Engagement

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#### OBJECTIVE

MGT will design and administer a set of protocols to garner insight of staff and leadership perspective regarding organizational culture, equity in the workplace, and the employee experience. Upon completion, we will evaluate all insight collected to ensure representative participation from all stakeholder groups and re-administer with targeted outreach if necessary.

#### DELIVERABLES

- ◆ Stakeholder Outreach Plan to maximize awareness and motivation for internal stakeholders to engage in the feedback portion of the equity audit
- ◆ Key Leader Interview Guide (contingent on project need)
- ◆ Focus Group Interview Guide and Protocol (contingent on project need)
- ◆ Organizational Assessment Equity Survey
- ◆ Quantitative and Qualitative analysis of survey results

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### 4.3 DEI Readiness Analysis and Organizational Culture Summary Report

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#### OBJECTIVE

Our DEI consultants will analyze all feedback and data to determine strengths, weaknesses, improvement opportunities, and performance trends. We will craft a comprehensive and succinct reader-friendly report that informs the organization of the state of equity with suggested action steps for improvement.

#### DELIVERABLES

- ◆ DEI Readiness Summary
- ◆ Organizational DEI Report: *The Current State of DEI at Oregon City*
- ◆ Final list of actionable recommendations on how to elevate DEI within the organization

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## Task 5.0: DEI FRAMEWORK DEVELOPMENT

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### 5.1 Future Envisioning Analysis

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#### OBJECTIVE

MGT will design and facilitate a workshop with the DEI Task Force and other members of the City's leaders to conduct future envisioning focused on building themes and initiatives around the specific collaborative desire for the state of DEI across the organization and the city. This work will result in the identification of a "North Star" for the organization to strive to become. This North Star will drive the work of the DEI Action Plan.

#### DELIVERABLES

- ◆ Facilitate review of DEI Audit Report and readiness assessment
- ◆ Facilitate Future Envisioning Workshop (in-person or remote)
- ◆ North Star Analysis Report
- ◆ Development of a shared organizational goal on DEI

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### 5.2 Development of DEI Action Plan

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#### OBJECTIVE

The North Star established during the future envisioning analysis and the data and feedback from the DEI audit will help inform the development of a set of strategies to advance DEI within the organization. MGT will facilitate a series of workshops with the DEI Task Force to collaboratively build the DEI Action Plan that includes a set of goals, actions, deliverables, and performance metrics.

#### DELIVERABLES

- ◆ Develop a public statement of principle regarding DEI for the City that serves as the guidepost for how it operates and makes decisions that impact budgeting, policies and procedures, operations, programming, outreach, and management practices
- ◆ Multi-Year strategic plan for all policies, actions, and changes needed to meet the City's DEI goals

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### 5.3 DEI Implementation Roadmap

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#### OBJECTIVE

MGT believes that the quality of a plan (DEI Action Plan) is inextricably tied to the quality of its delivery (Implementation Strategy). With this as our guide, we are committed to supporting the DEI Task Force in ensuring deep understanding and shared accountability of the DEI Action Plan to ensure quality implementation of all facets of the framework. The roadmap will include specific outcomes and deliverables, owners, dates, and accountability metrics.

#### DELIVERABLES

- ◆ Detailed Implementation Plan inclusive of the DEI Action Plan Timeline
- ◆ Implementation framework that assigns responsibility, accountability, resource allocation, key milestones, and dates for each strategic action
- ◆ Internal communication plan that ensures shared ownership and accountability
- ◆ City-Wide communication plan that promotes broad understanding and buy-in to the City's DEI goals