

Competitive Bid For Survey & Interview Services

RFP-2014-0330

TIMETABLE

| Event | Date |
|---|------------------------|
| Competitive Bid Issue Date | September 23, 2013 |
| Confirm receipt of this RFP and confirm intent to participate in RFP process. | September 27, 2013 |
| Contract Exceptions Submission | October 4, 2013 |
| Notification of Intent to Award a Contract | October 11, 2013 |
| Contract Executed | October 18, 2013 |
| Engagement Start Date | October 21, 2013 |

BACKGROUND

OHSU's mission is to:

- Educate tomorrow's health professionals, scientists, engineers and managers in top-tier programs that prepare them for a lifetime of learning, leadership and contribution.
- Explore new basic, clinical and applied research frontiers in health and biomedical sciences, environmental and biomedical engineering and information sciences and translate these discoveries, wherever possible, into applications in the health and commercial sectors.
- Deliver excellence in health care, emphasizing the creation and implementation of new knowledge and cutting-edge technologies.
- Lead and advocate for programs that improve health for all Oregonians, and extend OHSU's education, research and health care missions through community service, partnerships and outreach.



As the state's only health and research university, OHSU brings together patient care, research, education of the next generation of health care providers and scientists, and community service to improve the health and well-being of all Oregonians. For more background visit www.ohsu.edu In 1995, OHSU became an independent public corporation, and its governance became vested in the OHSU Board of Directors. As a public body, OHSU retains close ties to the State.

No potential OHSU contractor, supplier, or vendor shall be precluded from consideration, or shall themselves discriminate, based on race, color, religion, sex, age or national origin.

PURPOSE OF THIS COMPETITIVE BID

Oregon Health & Science University (OHSU) is seeking proposals to select a qualified firm to provide survey and interview services to understand our organization's climate for diversity and inclusion. This assessment would be used to benchmark the institution's progress against findings from the 2010 diversity climate survey to further enhance diversity within OHSU as a key component of OHSU's vision and core values. OHSU's Vision 2020, the institution's strategic plan, is to transform OHSU from an organization "that values diversity to one that lives it."

PROPOSAL EXECUTIVE SUMMARY

Please provide a brief summary of your organization, including:

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- Primary markets and market share
- Corporate location, as well as regional and local locations, as applicable
- Diversity of persons employed by your organization, including their roles and responsibilities related to the proposed study
- OHSU's primary contact with your company, including full name, address, phone, website and email
- Prior working relationships with OHSU, providing description of the work and your primary OHSU contact
- Demonstrated experience working with academic medical centers with 10,000+ participants (please provide a list of contracted institutions for similar work)
- Theoretical framework for implementing and analyzing a diversity climate survey
- Demonstrated experience conducting diversity climate surveys (quantitative and qualitative, focus groups, statistical analysis (SPSS), reporting results)
- Experience using an a synchronized (anonymous) blog for qualitative data collection
- Demonstrated experience in successfully marketing, communicating and implementing surveys
- Provide sample work, including template for surveys, reports, etc.
- 3-5 references with phone numbers and email addresses

Please provide an executive summary of your entire proposal, highlighting your specific strengths, and how those strengths transfer into value for OHSU.

FEES/PRICING

Professional Services. Please provide your pricing structure and schedule of payment. Your proposal must specify that, aside from the fees and expenses you propose, no other costs will accrue to OHSU for the proposed services.

Expenses must be limited to fifteen percent (15%) of professional fees, and firms are encouraged to demonstrate how they assure expenses are kept to a minimum, potentially even below the fifteen percent cap.

PROVIDER'S CONTACTS

Firm Profile.

- Please provide a brief history and the organizational structure of your firm
- Provide a general corporate overview of your consulting firm and client service philosophy
- Also identify the firm's office nearest to OHSU and the size of their staff
- Describe what characteristics separate your firm from your competitors
- Describe the diversity of the firm and include any company policies, mission and/or vision that incorporates the firm's commitment to diversity and inclusion
- Provide any information on the firm's community philanthropy or outreach efforts

Management.

- Provide your key contacts to OHSU
- Describe the individual roles and responsibilities; briefly detail credentials and related experience
- Describe your company's approach to customer service

References.

Provide 3 – 5 clientele references.

SCOPE OF WORK

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OHSU envisions two data collection efforts: (1) web-based/paper questionnaire and (2) in-person interviews with groups and/or individuals to provide the necessary data and information to evaluate the diversity and inclusion climate.

Questionnaires. The Vendor will draw from personnel and student records provided by OHSU to develop and implement a customized organizational climate survey. This survey must be

comparable to and benchmarked with the climate survey conducted in 2010. OHSU will provide the awarded respondent with electronic population lists which will include the following identifiers:

- Unique ID
- Employee and student names
- Email address(s)
- Program (students) or job group and unit (employees)
- Enrollment site (students) or job location (employees)

The Vendor will be expected to consult and advise on a final quantitative and qualitative survey instrument that correlates with OHSU's 2010 diversity climate survey, including a pretest pilot. Demographic variables of importance to the organization include: length of service, area of service, full-or part-time status, union affiliation, gender (male, female, and transgender), generation, parental status, race, ethnicity, age, sexual orientation, veteran status, job classification, disability (according to Americans with Disabilities Act standards), level of education, U.S. citizenship status, and religious affiliation.

The request requires the Vendor to assist OHSU to refine an appropriate questionnaire that addresses the multi-dimensional nature of the organizational climate.

- The percentage of minorities in the State of Oregon is 23.9%
- Women comprise 50.5% of the population in the State of Oregon
- The percentage of minorities of the OHSU workforce is 18.6%.
- Women employees make up 66% of the OHSU workforce.

Distribution of the web and paper-based survey is to be designed and implemented by the Vendor in consultation with OHSU staff. Consideration may be given to distributing the survey in phases to not jeopardize the integrity of OHSU's electronic communication capacity. We expect a reasonable response rate of no less than 33%, based on the participation rate of 42% in 2010. The survey must ensure the demographic characteristics of the respondents are proportional to the demographics of the student body and employees. The Vendor will be asked to pilot test a web version of the survey.

Focus Group Interviews. The Vendor will draw the sample for focus group interviews after the completion of the questionnaire. OHSU would like the fee structure for focus groups to be included and called out in the proposal. Advice from the vendor will be required to determine the participants of 10 – 15 focus groups once organizational data are reviewed. Interviews and focus group sessions will require recordings or transcriptions. The interviews and qualitative analysis should be meaningfully correlated with participant demographics.

Asynchronous Qualitative Data Collection. The Vendor will devise and develop a blog-type platform for asynchronous communication to facilitate additional qualitative data collection. OHSU requires the framework and fee structure for this process to be described in the proposal.

Survey Participants. The Vendor will describe protocols and communication strategies for gathering data on employees whose primary language is not English. The data will be gathered through designated small group sessions. (English, Spanish, Mandarin Chinese and Russian are the top four languages spoken at the university. Employees have self-identified as native speakers of up to 40 languages or dialects).

Final Products & Deliverables. OHSU requires an initial meeting with the Vendor to discuss the project, timeline, analysis, and deliverables. It is expected that the Vendor maintain regular communication with OHSU staff regarding the project status, providing timelines and updates regarding data collection, coding, and requested analysis. OHSU staff expects to review draft versions of all deliverables before the final reports are issued.

OHSU expects a full transcription of all open-ended responses and focus group interviews along with responses grouped by themes and demographics. The Vendor will propose categories for the analysis of open-ended comments to which OHSU shall review and determine.

OHSU expects the Vendor to analyze all data produced from the survey and to benchmark new data to existing data collected in 2010.

It is anticipated that data collection will begin the third week of January, 2014, with a final report provided to the OHSU no later than **April 1, 2014**. Respondents are asked to indicate the estimated length of time per survey on which the proposal is based. Respondents are also asked to submit a proposed schedule for meeting the April 1, 2014 deadline.

The Vendor will include presentations of findings to an agreed upon set of meetings (e.g., Diversity Advisory Council, Executive Leadership Team or President's Council, and university community) to encourage open and honest discussion of the findings and recommendations.

All data collected and provided to vendor shall be subject to a confidentiality agreement, and be delivered to and remain the sole and exclusive property of OHSU. At the conclusion of the survey study, the firm will be required to return all survey data elements, collected responses and qualitative transcripts with identifiers removed. All data collected and provided to vendor must be kept secured and encrypted by vendor. Before final payment will be made, the firm will be required to provide written confirmation that all data obtained from the survey has been returned to OHSU.

ISSUING OFFICE

The OHSU Contracting Services Group is the Issuing Office. It is the sole point of contact for OHSU during the selection process. All correspondence pertaining to this proposal should be directed to the Issuing Office as indicated below:

Patricia Jacobs
S. Contracts Specialist, Contracting Services Group
Office: 503-494-2453
Email: jacobspa@ohsu.edu

CONTRACT EXCEPTIONS

Any exceptions to OHSU's Contract Terms and Conditions (Attachment 1) must be submitted to Issuing Office by October 4, 2013 by 4:00 pm Pacific time via email. Respondent's submittal must use "red-line" format with explanation for the company's business or other reason why the specific language of OHSU's terms and conditions cannot be used. Additional Terms and Conditions may also be added in "red-line" version to OHSU's Contract Terms and Conditions. These exceptions and additions will form the basis for negotiation of any contract resulting from this Bid. While this section is not scored, failure to address exceptions and additions may be grounds for rejecting the Bid.

No additional proposed changes to OHSU's Contract Terms and Conditions will be considered beyond the submission date ([DATE]) and during the contract negotiations unless there is a material reason to do so.

If a contract cannot be executed with the awarded Respondent the remaining proposals will be considered and an award may be made from those respondents if it is in the best interest of OHSU.

PUBLIC RECORDS

OHSU is a public body subjects to the Oregon Public Records Law (see ORS 192). All information submitted to OHSU may be a public record subject to disclosure, subject to the exemptions contained in ORS 192.

**Respondents should not mark documents confidential
but only sections or pages that are trade secrets.**

AWARD

OHSU reserves the right to, at its sole discretion, revise/postpone and/or cancel this RFP until further notice. The issuance of this Bid does not obligate OHSU to award a contract to any participating respondent. Such award shall be at the sole discretion of OHSU.

ATTACHMENTS Information concerning OHSU:

Attachment 1 - OHSU Contract Terms and Conditions

Attachment 2 -
Attachment 3 -
Attachment 4 -

Appendix IV
Diversity Criteria

Check all the boxes in the table below that apply to you or your company: possible 5 points for each check below:

| DIVERSITY EVALUATION MATRIX | |
|-----------------------------|--|
| <input type="checkbox"/> | 5 Points - Woman Owned – State Certified |
| <input type="checkbox"/> | 5 Points - Minority Owned* – State Certified |
| <input type="checkbox"/> | 5 Points - Emerging Small Business – State Certified |
| <input type="checkbox"/> | 5 Points - Disadvantaged Business Enterprise – State Certified |

State of Oregon Office of Minority, Women and Emerging Small Business certification website:

<http://www.oregon4biz.com/Grow-Your-Business/Business-services/Minority-Owned-Business-Certification/>

*Recognized minority groups: Black American, Hispanic American, Native American, Asian Pacific American, and Subcontinent Asian American

Authorized Signature

Date

Authorized Name (type or print):

Appendix A: Diversity Advisory Council (DAC) and Physical Access Committee (PAC) Charges

Diversity Advisory Council:

Encouraging diversity within OHSU is a key component of OHSU's vision and core values. To further this important vision and value, the DAC will advise the President on matters related to diversity, multiculturalism, and equal opportunity relating to all aspects of the university's mission: teaching; healing; research; and community service.

Physical Access Committee:

The Physical Access Committee (PAC) is charged with identifying barriers to access by people with disabilities at OHSU and to present findings and recommendations to OHSU's administration concerning access needs and priorities for meeting those needs.

The committee's primary responsibility is to identify barriers that interfere with the ability of people with a disability to access OHSU. Findings and recommendations shall identify the barriers to access that prevent people with a disability from meaningfully using campus facilities related to instruction, academic support, assembly and residence.

Appendix B: OHSU Diversity Definition and Business Case

OHSU's Diversity Advisory Council developed a definition for diversity and a compelling business statement for diversity, which has been adopted into the university's Equal Opportunity Policy.

OHSU's Diversity Definition

At OHSU, we embrace the full spectrum of diversity, including age, color, culture, disability, ethnicity, gender identity or expression, marital status, national origin, race, religion, sex, sexual orientation, and socioeconomic status. We respect and support diversity of thought, ideas and more.

To fully leverage the richness of our diversity at OHSU, we must create, maintain and promote a community of inclusion. Inclusion means we honor, respect, embrace and value the unique contributions and perspectives of all employees, patients, students, volunteers and our local and global communities. It also includes removing barriers to individual success.

Diversity and inclusion maximize our true business potential, creativity, innovation, quality patient care, educational excellence and outstanding service.

OHSU's Business Case for Diversity

Diversity is essential to realize our multifaceted mission and to set the example for integrity, compassion and leadership in healthcare, education, research and community service.

Diversity is fundamental to OHSU's ability to attract and retain top talent, achieve innovation and creativity, flourish in a competitive market, maximize the return on our investment in people, and ensure flexibility to thrive.