

SECTION V – ATTACHMENTS

Solicitation No: RFP 20-0027

Developing and Providing a Program to Cultivate an Equitable, Inclusive and Antiracist District Operational Culture.

PROPOSAL SUBMISSION CHECKLIST

ALL CERTIFICATIONS, FORMS, AFFIDAVITS AND DETAILED PROPOSAL CONTENT REQUIREMENTS AS SPECIFIED IN SECTION IV MUST BE INCLUDED IN PROPOSALS.

REQUIRED AFFIDAVIT, CERTIFICATIONS AND FORMS

The following certifications and forms must be completed and signed by the person authorized to represent the Proposer regarding all matters related to the Proposal and authorized to bind the Proposer to the agreement. Failure to submit any of the required, completed and signed certifications/forms shall result in disqualification of the proposing firm.

PROPOSER CERTIFICATION. (Attachment A) This may serve as the cover sheet for your Proposal.

INDEPENDENT CONTRACTOR CERTIFICATION. (Attachment B)

AFFADAVIT OF NON-COLLUSION / COMPLIANCE WITH TAX LAWS. (Attachment C)

NON-CONFLICT OF INTEREST CERTIFICATION. (Attachment D)

PROPOSER RESPONSIBILITY FORM – All Pages. (Attachment E)

PROPOSER REFERENCE FORMS – (Attachment F) - please see page 7 in proposal

DETAILED PROPOSAL CONTENT REQUIREMENTS

Detailed Proposal Content Requirements are specified in SECTION IV – RESPONSE AND EVALUATION.

The following attachment(s) are NOT to be returned with the Proposal. The content of these attachment(s) must be reviewed by the Proposer. The terms and conditions are incorporated in this Solicitation and will apply to the Contract to be executed for the work.

ATTACHMENT H      Sample Personal Services Contract

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**INDEPENDENT CONTRACTOR CERTIFICATION**

Proposer: TPI dba CENTER FOR EQUITY AND INCLUSION

Employer Identification Number: 810751262

If Proposer signs Part A, the remainder of this Certification Statement does not need to be completed.

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**Part A. Proposer is a Corporation:**

The Proposer/Firm is a business entity licensed, registered and authorized to do business in the State of Oregon.

Proposer Signature: K. J. Belsay Date: 3/3/21

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**Part B. Proposer is an Independent Contractor:**

I, under penalties of perjury, certify that I am an independent contractor as defined in ORS 670.600 and that the following statements are true and correct:

1. I have filed Federal and State income tax returns in the name of my business or a business Schedule C as part of the personal income tax return, for the previous year, or expect to file federal and state income tax returns, for labor or services performed as an independent contractor in the previous year.
2. I will furnish the tools or equipment necessary for the contracted labor or services.
3. I have the authority to hire and fire employees who perform the labor or services.
4. I represent to the public that the labor or services are to be provided by my independently established business as four (4) or more of the following circumstances exist.

(Please check all that apply):

- A. The labor or services are primarily carried out at a location that is separate from my residence or is primarily carried out in a specific portion of my residence, which is set aside as the location of the business.
- B. Commercial advertising or business cards are purchased for the business, or I have a trade association membership with \_\_\_\_\_.
- C. Telephone listing is used for the business that is separate from the personal residence listing.
- D. Labor or services are performed only pursuant to written contracts.
- E. Labor or services are performed for two or more different persons or agencies within a period of one year.
- F. I assume financial responsibility for defective workmanship or for service not provided as evidenced by the ownership of performance bonds, warranties, errors and omissions insurance or liability insurance relating to the labor or services to be provided.

Proposer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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ATTACHMENT C  
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**AFFIDAVIT OF NON-COLLUSION / COMPLIANCE WITH TAX LAWS**

TPI dba Center for Equity and Inclusion  
(Proposer)

I state that:

- (1) The correct taxpayer identification numbers are:  
A. Federal Employer ID Number (EIN): 810751262 B. Employer's Oregon ID Number: 119887099
- (2) Proposer is not subject to backup withholding because (i) Proposer is exempt from backup withholding, (ii) Proposer has not been notified by the IRS that Proposer is subject to backup withholding as a result of a failure to report all interest or dividends, or (iii) the IRS has notified Proposer that Proposer is no longer subject to backup withholding;
- (3) The price(s) and amount of this Proposal must be arrived at independently and without consultation, communication or agreement with any other Supplier, Proposer or potential Proposer, except as disclosed on the attached appendix.
- (4) That neither the price(s) nor the amount of this Proposal, and neither the approximate price(s) nor approximate amount of this Proposal, will be disclosed to any other firm or person who is a Proposer or potential Proposer, and they will not be disclosed before Contract award.
- (5) No attempt has been made or will be made to induce any firm or person to refrain from proposing on this Solicitation, or to submit any noncompetitive Proposal or other complementary Proposal.
- (6) The Proposal of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive Proposal.
- (7) TPI dba Center for Equity and Inclusion (name of firm), its affiliates, subsidiaries, officers, directors and employees are not currently under investigation by any governmental agency and have not in the last four years been convicted of or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to proposing on any public contract, except as described in the attached appendix.

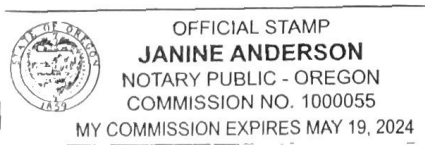
I state that Turning Point Initiatives dba Center for Equity + Inclusion (name of firm) understands and acknowledges that the above representations are material and important, and will be relied on by the Beaverton School District in awarding the contract(s) for which this Proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is and will be treated as fraudulent concealment from the Beaverton School District of the true facts relating to the submission of Proposals for this contract. I am authorized to act on behalf of Proposer, and have authority and knowledge regarding Proposer's payment of taxes, and to the best of my knowledge, Proposer is not in violation of any Oregon tax laws, including, without limitation, those tax laws listed in ORS 305.380(4), the elderly rental assistance program under ORS 310.630 to 310.706; and any local taxes administered by the Oregon Department of Revenue under ORS 305.620.

K. J. Belsey  
(Affiant's Signature)

STATE OF OREGON

County of Multnomah

Signed and sworn to before me on March 3 2021 by Karen Belsey  
(date) (Affiant's name)



Notary: Janine Anderson  
My Commission Expires: May 19, 2024

**NON-CONFLICT OF INTEREST CERTIFICATION**

Issuing Agency: Beaverton School District

I, Karen J. Belsey hereby certify I have read the statement defining conflict of interest as quoted below; that I understand the statement; that no conflict of interest exists as therein defined, which precludes an impartial Bid/Proposal to be submitted by myself or the entity/company for which the Bid/Proposal is submitted, and that if such a conflict should arise, I will immediately notify the Beaverton School District and disqualify my Bid/Proposal.

**"NO OFFICER, EMPLOYEE, OR AGENT OF THE BIDDER/PROPOSER HAS ANY PERSONAL FINANCIAL INTEREST, DIRECT OR INDIRECT, IN THE OPERATION OF THE BEAVERTON SCHOOL DISTRICT OR WITH ANY PARTY CONNECTED WITH THE OREGON SCHOOL AND DISTRICT IMPROVEMENT NETWORK, DIRECTLY OR INDIRECTLY."**

Karen J. Belsey

Proposer Name (signature)

KAREN J. BELSEY

Proposer Name (printed)

DIRECTOR OF OPERATIONS

Proposer Title (printed)

TURNING POINT INITIATIVES dba Center for Equity and Inclusion

Entity/Company Name (printed)

March 3, 2021

Date

**PROPOSER RESPONSIBILITY FORM  
(PROPOSER'S QUALIFICATIONS AND FINANCIAL INFORMATION)**

**DECLARATION AND SIGNATURES**

The undersigned hereby declares that the he or she is duly authorized to complete and submit this Proposer Responsibility Form and that the statements contained herein are true and correct as of the date set forth below. Incomplete, incorrect or misleading information will be reason for a determination by the District of Proposer non-responsibility.

Date: March 3, 2021

By: Karen J. Belsey  
(Signature of authorized official)

Name: Karen J. Belsey  
(Please type or print)

Title: Director of Operations  
(Please type or print)

For: TURNING POINT INITIATIVES dba CENTER FOR EQUITY + INCLUSION  
(Firm's name) (Please type or print)

**Instructions**

1. The information provided in this form is part of the District inquiry concerning proposer responsibility. Please print clearly or type.
2. If you need more space, use plain paper. Submit completed form with Proposal response.
3. Answer all questions. Submission of a form with unanswered questions, incomplete or illegible answers may result in a finding that the Proposer is not a responsible Proposer.

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ATTACHMENT E  
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**RELIABILITY**

Has your company ever been declared in breach of any contract for unperformed or defective work?  Yes.  No.

If "yes", explain.

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Has any employee or agent of your company ever been convicted of a criminal offense arising out of obtaining, attempting to obtain, or performing a public or private contract or subcontract?  Yes.  No.

If "yes," explain.

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Has any employee or agent of your company been convicted under state or federal law of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property or any other offense indicating a lack of business integrity or business honesty?  Yes.  No.

If "yes," explain.

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Has your company or any employee or agent of your company been convicted under state or federal antitrust laws?  Yes.  No.

If "yes," explain.

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Has any Officer or Partner of your organization ever been an Officer or Partner of another Organization that failed to complete a construction contract?  Yes.  No.

If "yes," explain.

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**FINANCIAL RESOURCES**

Has your firm ever been at any time in the last ten years the debtor in a bankruptcy case?  Yes.  No.

If "yes," explain.

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Does your firm have any outstanding judgments pending against it?  Yes.  No.

If "yes," explain.

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In the past ten years, has your firm been a party to litigation, arbitration or mediation where the amount in dispute exceeded \$10,000?  Yes.  No.

If "yes," explain. (Include court, case number and party names.) \_\_\_\_\_

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In the past ten years, has your firm been a party to litigation, arbitration or mediation on a matter related to payment to subcontractors or work performance on a contract? Check "yes" even if the matter proceeded to arbitration or mediation without court litigation.  Yes.  No.

If "yes," explain. (Include court, case number and party names.)

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Have you or any of your affiliates discontinued business operation with outstanding debts?  Yes.  No.

If "yes," explain.

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**KEY PERSONNEL**

List the principal individuals of your company, their current job title, the total years of experience they have in the industry and their current primary responsibility for your company. Corporations list current officers and those who own 5% or more of the corporation's stock. Limited liability companies list members who hold a 5% or greater share of the company. Partnerships list all partners. Joint ventures list each firm that is a member of the joint venture and the percentage of ownership the firm has in the joint venture.

ITEM	Principal Individual
A. Name	HANIF FAZAL
B. Position	OWNER, EXECUTIVE FACILITATOR
C. Years in Position	FIVE YEARS
D. Current Primary Responsibility	OWNER, EXECUTIVE FACILITATOR
ITEM	Principal Individual
A. Name	TREWINE KIROS
B. Position	OWNER, EXECUTIVE FACILITATOR
C. Years in Position	FIVE YEARS
D. Current Primary Responsibility	OWNER, EXECUTIVE FACILITATOR
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Position	
D. Current Primary Responsibility	
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Position	
D. Current Primary Responsibility	

Person who will be in direct charge of work if your company is awarded this Contract:

ITEM	PERSON IN DIRECT CHARGE
A. Name	HANIF FAZAL
B. Position	OWNER, EXECUTIVE FACILITATOR
C. Years in Position	5 YEARS
D. Largest Project Supervised -\$	\$1.5 MILLION
E. Largest number of employees ever supervised	35



3/4/21

# **Beaverton School District**

## **Equity Advancement Proposal**

Proposal response to RFP 20-0027

**Center for Equity and Inclusion**

[www.ceipdx.com](http://www.ceipdx.com)

## Experience and Qualifications

Founded in 2015, Center for Equity and Inclusion (CEI) is a BIPOC -owned and led consultancy advancing equity, diversity, and inclusion (EDI) efforts within organizations, education systems and communities. Our methodologies drive transformational change. Educators Hanif Fazal and Frewine Kiros founded CEI as a holistic, human -centered learning and strategy partner. We provide assessment, facilitated and independent learning, leadership development, coaching, and strategic consultation to organizations of all sectors. Our work guides people in connecting the dots between racial and economic disparities, the systems we all navigate and the institutions that maintain these disparities. By doing so, we encourage each individual to make positive change so everyone e can thrive. Having served over 100 organizations nationwide, CEI currently offers Equity Certificate, our year -long EDI program for K -12 educators in partnership with Lewis and Clark College. We also partner with various school -based districts/entities a cross the state (Portland Public Schools, Gresham-Barlow School District, Oregon Education Association) as well as large-scale organizations (Providence OR, PeaceHealth), national non -profits (Feeding America, Playworks), and foundations (Stupski Foundatio n, Meyer Memorial Trust).

Our vision is anchored by a single theory of change: in order for meaningful, sustainable change to occur, a transformative process must take place. This process must support individuals within an organization in developing shared agreements, a common language, consciousness, and value in relationship to EDI (personal and culture work). It must also develop concrete tools and an equity plan that embed EDI into an organization's identity, policies and procedures (institutional work ).

CEI is rooted in education. With over 20 years of collective experience guiding educators and administrators in personal learning, organizational change and strategic application, CEI has become a well-known and trusted partner in advancing long -term c hange in the educational sector.

**Our Mission: to transform the spaces we work and live in.**



# Staffing and Approach

## Staffing

CEI suggests the following staff and roles to support Beaverton School District in this engagement. Once CEI meets with BSD, we may amend roles and responsibilities.

- **1 Partner Lead:** Lead consultant for the overall engagement. Responsible for working with BSD's Superintendent Cabinet and Planning Team.
- **3 School -Based Strategists/Facilitators:** Onboards BSD's district -wide Equity Team and school -based principal cohort with Partner Lead input. Participates in Planning Team-related work and sessions. Provides coaching and targeted support when needed.
- **1 Project Manager:** Manages the day -to-day needs across the engagement. Primary contact for BSD with scheduling logistics, client communications, etc. Provides internal support to prepare and manage learning sessions and deliverables. Attends client sessions to support Partner Lead and team with logistics and note -taking.

## Approach/Statement of Work

CEI will embark upon a multi -year partnership with Beaverton School District to guide the District in cultivating an equitable, inclusive and anti -racist culture where staff and students thrive. Culture transformation takes time; in our first year of partnership, CEI will engage an initial set of key stakeholders to build a foundation in which additional equity, inclusion and anti-racism efforts will grow.

Over the course of the year, CEI will support these stakeholder groups in building capacity and cultivating champions of equity throughout BSD. Additional aspects of engagement will include:

- Building common language, framework, agreements and protocols
- Strengthening understanding and connection to equity, inclusion and anti - racism
- Application of an Equity Lens to problems of practice
- Initial development of a district -wide Equity Plan (building from the BIPOC anti-racist plan that has been proposed)
- For Building Principals, engage a learning cohort to address common

challenges and cultivate building leaders for equity

- For Teachers (School-Based Team Leadership Development), engage a learning cohort by participating in CEI's Equity Certificate program. This program guides K -12 educators and administrators to become leaders for equity in classrooms with a focus on support to BIPOC students and families
- Providing independent coaching and consultation to BSD leadership and staff to deepen commitment and trust in this work

Each stakeholder group will be engaged in a series of learning and equity application sessions. We will create a new, BSD Planning Team, a group of key stakeholders who will work with CEI to connect the work between groups, provide strategic input, support in logistics, and collaborate on tracking progress across the engagement. CEI serves not only as the facilitator of sessions, but in thought leadership, coaching, check-ins and targeted support for the many moments between sessions. CEI will be a dedicated partner to BSD in all aspects of our engagement.

Per your RFP, we have organized the work into the following components:

### Onboarding

Internal planning and preparation with CEI's team. Initial introductions and relationship building with BSD key stakeholders. Review, identification and onboarding of BSD's new Planning Team.

What CEI will do:

- Review relevant research and data on BSD as a District as well as organizational and demographic data
- Schedule and meet with BSD key stakeholders to review the engagement, discuss roles and responsibilities, review our process and milestones, and begin planning the onboarding of BSD's Planning Team

### Planning Team

The Planning Team will be responsible for planning, debriefing and collaboratively working with CEI to ensure we are keeping one another accountable in this work and keeping communication fluid and transparent. We will meet monthly.

What CEI will do:

- Plan and lead 10, 2-hour monthly Planning Team sessions

### **BSD Cabinet Launch and Learning Sessions**

CEI will engage BSD Leadership in a launch intensive followed by up to 6 sessions (to be scheduled across the engagement) to become champions and co-creators of an equitable, inclusive and anti-racist culture. This is an accelerated learning process that will focus on: Equity Lens application, accountability to clear goals/outcomes, building common language, framework, comfort, familiarity and value.

What CEI will do:

- Plan and lead an Equity Foundation Intensive with Cabinet: 3 days, 5 hours each day (within one week ideal)
- Plan and lead up to 6 follow-up sessions across the engagement, 3 hours each

### **District Equity Team Launch and Learning Sessions**

CEI will provide guidance in recruiting and onboarding BSD's new District Equity Team. As with BSD Cabinet, the Equity Team will go through our Equity Foundation Intensive and then follow with 9 monthly learning and work sessions. Together, we will align/center and identify clear problems of practice within the BIPOC Anti-Racist Action Plan, set goals and timelines. We will inform the Action Plan with multiple perspectives. We will build common language, framework, capacity to inform and steward equity, inclusion and anti-racism efforts, and align district/school buildings with common direction.

What CEI will do:

- Plan and lead the Equity Foundation Intensive with Equity Team: 3 days, 5 hours each day (within one week ideal)
- Plan and lead 9 monthly sessions, 3 hours each

### **School Board Learning Sessions**

This is time to meet with BSD's board to ensure orientation and alignment in this work together with focus on planning and strategy.

What CEI will do:

- Provide up to 12 hours of board learning and alignment to this work
- Sessions will be confirmed with Planning Team and other key stakeholders

- Sessions will be spread across engagement

### **Building Principals Launch and Learning Sessions**

CEI will organize a cohort of Building Principals to engage school leaders. Similar to groups above, Building Principals will go through our Equity Foundation Intensive followed by up to 6 learning sessions.

We will build common language, framework, capacity to inform and steward equity, inclusion and anti-racism efforts, and align district/school buildings with common direction.

What CEI will do:

- Plan and lead the Equity Foundation Intensive with Building Principals: 3 days, 5 hours each day (within one week ideal)
- Plan and lead up to 6 follow-up learning sessions, 3 hours each

### **School-Based Team Leadership Development**

BSD will select up to 15 administrators and educators from 3 school sites to participate in CEI's Equity Certificate 2021-2022 cohort.

- Participation in CEI's Equity Certificate year long intensive, cohort model 3 school sites with 5 participants from each - begins August 2021
- Building internal capacity among teacher leaders to hold ongoing DEI work - consideration for 2022

In addition to your RFP requests, we recommend including the following:

### **1:1 Coaching and Consultation**

Time to meet independently with the Superintendent and other key stakeholders throughout the engagement.

- Provide up to 30 hours of coaching and consultation across the engagement

### **Contingency**

It is necessary to include additional funds to address real-time issues that arise within the engagement. This may include additional sessions, meetings, planning time, etc.

- Provide a contingency budget of \$15,000





## References

Per your RFP, we provide 5 references from education, philanthropy, healthcare and equity leadership in Washington County. We do not share client project fees.

1. Sam Breyer  
Superintendent  
**Multnomah Education Service District**  
Partnership Duration: 2018-2020  
503.257.1504  
[sbreyer@mesd.k12.or.us](mailto:sbreyer@mesd.k12.or.us)
2. James Hiu  
Deputy Superintendent/HR  
**Gresham -Barlow School District**  
Partnership Duration: 2019 -2020  
503.261.4599  
[hiu@gresham.k12.or.us](mailto:hiu@gresham.k12.or.us)
3. Briana Ekandem  
Service Area Chief HR Officer  
**Providence Health & Services**  
Partnership Duration: 2019-present  
[Briana.Ekandem@providence.org](mailto:Briana.Ekandem@providence.org)
4. Tricia Tillman (ProvidenceOR partner/strategist)  
Chief Equity and Inclusion Officer  
**Washington County**  
Partnership Duration: 2019 -present  
[latricia\\_tillman@co.washington.or.us](mailto:latricia_tillman@co.washington.or.us)
5. Ami McReynolds  
Chief Equity and Programs Officer  
**Feeding America**  
Partnership Duration: 2019 -present  
[amcreynolds@feedingamerica.org](mailto:amcreynolds@feedingamerica.org)

## Price Schedule

The following components of work are anticipated to be completed in a 12 month period of time. The proposed scope of work (including \$87,500 for School -Based Team Leadership Development and \$15,000 for Contingency) will not exceed \$410,000.

Staff rates and estimated hours are provided below.

Staff Role	Hourly Rate	Estimated Hours
Partner Lead	\$360/hour	202 hours
SB Strategist	\$420/hour	94 hours
Facilitator 1	\$300/hour	323 hours
Facilitator 2	\$300/hour	238 hours
*Coaching (Partner Lead, Facilitators)	\$330/hour	30 hours
Project Manager	\$240/hour	60 hours

\*Coaching is a blended rate