



Request for Proposal December 22, 2020

Please direct all inquiries and responses to:

Deb Pattison, Compensation Manager

Center for Community Self-Help

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Purpose:

By issuing this request for proposal, the Center for Community Self-Help (hereafter referred to as Self-Help) is soliciting proposals for a consultant to perform an equity analysis of Self-Help's compensation policies and practices.

Background:

The non-profit Center for Community Self-Help and its financing affiliates, Self-Help Credit Union, Self-Help Federal Credit Union, and Self-Help Ventures Fund comprise one of the nation's leading community development financial institutions. The Center was established in 1980 to help start and support worker-owned businesses in North Carolina. It soon became apparent that many clients could not succeed because they could not obtain conventional financing. In 1984, we established the Credit Union and Ventures Fund to meet this need and have been making home and commercial loans since. We operate in North Carolina, South Carolina, Florida, Washington, D.C., Chicago Area, Wisconsin, and California.

Our mission is creating and protecting ownership and economic opportunity for all, especially people of color, women, rural residents and low-wealth families and communities. We do this by providing responsible financial services, lending to small businesses and nonprofits, developing real estate and promoting fair financial practices. Since 1980, Self-Help has provided over \$5 billion in financing to tens of thousands of small businesses, non-profits, and homebuyers.

Project Scope and Purpose:

Equity and fairness are central to vision and mission at Self-Help. Our organization strives to bring those values to the financial services marketplace and to live those values within our team.

The purpose of this RFP is for Self-Help to identify a partner who will perform an evaluation of current compensation policies and practices to:

- 1) Identify any areas where disparity exists by evaluating organization's positions and salary structure.
- 2) Evaluate whether the disparities are related to job specific criteria and can be explained by legitimate, nondiscriminatory reasons. Where the pay differences cannot be explained, recommend approaches to correct the issue.
- 3) Assist with development of process changes that will continue to support the organization's equity values.

Required Experience:

Partner must demonstrate 10+ years' experience consulting with large, multi-state organizations on career progressions, position benchmarking and salary structure development.

Deliverables:

Partner provides weekly written summary weekly via email outlining progress made, risks and issues encountered and plans to address those items.

At the end of the project, the partner will provide a written evaluation including a one to two-page executive summary.

Partner will participate in a debriefing session to explain and answer questions regarding the written evaluation. Self-Help will identify participants to represent organization at the session.

Submission Format:

Please include your narrative responses with each answer immediately following its corresponding request below. You may include standard marketing material relevant to the request; however, material essential to the evaluation of your proposal should be provided in the narrative responses.

1. What differentiates your organization from your competitors?
2. Describe the ability of your organization to meet the objectives defined within the project scope and required experience.
3. Describe the staffing level expected of Self-Help to support collection of data required to conduct the evaluation.
4. Provide an estimated timeline for project completion.
5. Identify and provide resumes for key personnel.

6. Please provide three client references.
7. Complete the 'Minority and Women-Owned Business Enterprise Project Participation' form below reflecting your supplier diversity and/or subcontracting goals.

Proposals not addressing all requirements will not be considered. Please limit submissions to a maximum of 40 pages plus resumes.

Submissions / Timeline:

- **Deadline for Inquiries:** Any inquiries must be submitted via email by 5 pm EDT on Monday, January 11, 2021.
- **Deadline for Proposals:** Please submit your proposal electronically by 5 pm on Friday, January 22, 2021.
- **Final Selection:** Final selection will be made on or around Monday, February 1, 2021.

Confidentiality:

All bidders are to regard this Request for Proposal, Self-Help's evaluation process, and all communication as strictly confidential. To finalize a working relationship, a Non-Disclosure Agreement will be required.

Evaluation:

Each submission will be evaluated in the following areas:

- Organizational Experience (40%)
- Key Personnel Experience (25%)
- References (15%)
- Cost (20%)

Minority Participation:

In 2018, Self-Help implemented supplier diversity goals to increase spending with minority and women-owned firms, which aligns directly with our mission to create economic opportunities for historically disadvantaged groups. Bids will include a completed 'Minority and Women-Owned Business Enterprise Project Participation' form to comply with Self-Help's supplier diversity goals.

Additional Information:

The following document has been attached for your reference:

- **Minority & Women-Owned Business Enterprise Project Participation** – this form should be filled out and submitted as part of your bid.

Minority & Women-Owned Business Enterprise (M/WBE) Project Participation

Self-Help's mission is to create and protect ownership and economic opportunity for all, especially people of color, women, rural residents and low-wealth families and communities.

We are committed to soliciting and encouraging minority and women-owned business participation in our procurement of goods, services, and construction contracts. Offerors seeking to do business with Self-Help and submitting for this bid should do the same.

Please indicate if your firm is an M/WBE firm (*if you are a M/WBE, please indicate which certification you hold and provide a copy of the certification when you submit your proposal*)

Anticipated M/WBE subcontracting/participation goal will be _____ percent for this project.

_____ is a Minority or Women-Owned Business. (Name of business)

List name of Certifying Entity* (if applicable): _____

**Include a copy of the certification document when you submit your proposal*

List the names of the M/WBE firms you intend to use as subcontractors or for other vital services.

Name of Firm	Scope of Work	MBE or WBE	Contact Name & Number

SELF-HELP CREDIT UNION RFP – M/WBE UTILIZATION

This form is to be submitted with bid.