

**Request for Proposal (RFP):
OSB Strategic Planning
Questions and Responses**

Oregon  Bar

What is the deadline and are extensions available?

The deadline is June 20, 2024, and could be extended, depending upon the proposals received.

Have you worked with a DEI consultant in the past?

Yes.

Questions relating to stakeholders:

- What type of people do you anticipate will make up the external stakeholder group that will provide input into the project?

We define external stakeholders to include those noted in the RFP and our 2021-2023 diversity action plan (a link to the DAP was provided in the RFP).

- How many external stakeholders do you expect to engage in this process?

There are approximately 15 external stakeholder groups. During the development of the DAP, external stakeholder groups were invited to participate in a series of listening sessions. The number of people who actually participated varied. While OSB staff will schedule similar listening sessions to obtain input for the strategic planning process, the consultant would be responsible for facilitating these listening sessions.

- What are the approximate number of individuals in the internal stakeholder group?

We define internal stakeholder groups to include the BOG, ACDI, QOL, OAAP, and PLF, as well as OSB staff. We envision a strategic planning committee of 10 to 12 individuals who would represent the different internal stakeholder groups. Additional information about each internal stakeholder group can be found by clicking on the group name.

- [OSB Board of Governors](#) (BOG) - 19 attorney and public members
- [OSB Advisory Committee on Diversity & Inclusion](#) (ACDI) – 16 attorney and public members, plus 3 advisory members
- [OSB Quality of Life Committee](#) (QOL) – 10 attorney members
- [Oregon Attorney Assistance Program](#) (OAAP) – 4 attorney counselors

The people in both stakeholder groups are primarily legal professionals (i.e., paralegals, attorneys, and judges) and could also include law students and volunteer members of the public who serve on other OSB groups.

Are out-of-state vendors eligible to lead this project?

Yes, with two caveats:

1. Travel to Oregon may be necessary; travel costs are factored into the budget stated in the RFP.
2. Out-of-state vendors may also be asked how they will gain an understanding and be responsive to the culture of the Pacific Northwest (e.g., population demographics and urban/rural differences for both the state and the Oregon legal profession).

Do you have a preference on whether this planning process is conducted virtually, hybrid, or in-person?

Hybrid is preferred, although the details are open for discussion. We expect the strategic planning committee to meet in-person at least once at the start of the planning process. Future meeting formats will be dependent on the needs of the participants.

The consultant will be expected to have the capacity and expertise to hold and facilitate 100% virtual, hybrid, and in-person meetings that foster inclusion, participation, and collaboration.

Questions relating to public meetings law requirements:

- What specific requirements must be met from the consultant’s side to comply with Oregon Public Meetings Law?

While there is nothing specific the consultant must do to comply with the public meetings law, some of the process can be cumbersome. As the RFP states, OSB staff will ensure that technical requirements such as notice, minutes, and location accessibility are met. In addition, OSB staff will advise when public meeting requirements must be met.

- What are potential challenges you anticipate in engaging diverse stakeholders and ensuring inclusivity in public meetings?

There is no confidentiality around what is said during a public meeting. Accordingly, some people may be hesitant to be candid in sharing their opinions, ideas, and experiences.

Please share the existing Theory of Change Framework and Evaluation Plan mentioned in the RFP.

Please click [here](#) for the framework and evaluation plan.

Questions relating to the intersection with other OSB planning:

- Is there any additional information or context about the OSB’s current DEI and WB initiatives that would be helpful for us to know?

Some areas to be examined will be carried over from our 2021-2023 DAP. We are transitioning from a separate DAP to a single strategic plan that incorporates DEI, WB, and other initiatives.

- Are there other ongoing projects or initiatives within the OSB that might intersect with or impact this strategic planning process?

As mentioned in the RFP, we are also doing strategic planning around our access to justice work and doing follow-up on our 2022 workplace culture survey. Both of these include DEI components.

- When you say “overall vision and mission for the strategic plan” in the RFP, is this about the purpose and desired outcomes of the strategic plan, not OSB’s vision and mission?

Yes.

Please share the template you’re using to integrate all the strategic plans.

Please click [here](#) for the template.