

**Request for Proposal (RFP) – Equity, Diversity, and Inclusion (EDI) Training Curriculum for  
League of American Orchestras**

**Introduction**

League of American Orchestras (the League) is seeking proposals for a series of Joint Board and Staff training sessions. Each consultant responding to this RFP is invited to:

- » Inform themselves on all aspects of the work;
- » Submit a proposal that addresses all components identified below; and
- » Send proposal to:

Simon Woods  
President and CEO  
[swoods@americanorchestras.org](mailto:swoods@americanorchestras.org)

By submitting a proposal, the consultant agrees to comply with the process as outlined and understands that acceptance of a proposal will occur only when a contract is executed.

**RFP Schedule**

<b>Event</b>	<b>Dates</b>
Deadline for Proposals to the League	Oct 4
Applicants not invited for interviews notified	Oct 15
Consultants Invited to meet project interview committee	Oct 15-22
Selected Consultant Notified	Oct 22
Projected Project Start	ASAP

**Request for Proposals**

The League is seeking proposals for a Joint Staff and Board Training Series, which includes:

- » Recommending key topics for six training sessions, once per month for six months, in consultation with a small group of board and staff members (Some topics have already been identified.)
- » Recommending a further series of six sessions to be considered for the following six months.
- » Recommending consultant(s) to deliver the training sessions; either one for the whole cycle, or many voices.
- » Recommending a series of “on-demand” additional resources that can be made available to current board and staff members, as well as to new members during onboarding.
- » Assist in scoping the budget for the above.

## 1. Background

As the national member association for symphony orchestras, the League leads, supports, and champions America's orchestras and the vitality of the music they perform. In its most recent equity, diversity, and inclusion (EDI) planning activities, the League learned that its membership has a strong desire to serve people of all races, abilities, and genders from a range of socioeconomic backgrounds, and needed support in doing so in meaningful and fiscally sound ways. To model the change the field seeks, the League itself is on a learning path to develop authentic EDI practices and stands committed to using its resources in support of field progress. The League's commitment to supporting the field in growing knowledge and understanding of EDI is based on the belief that EDI:

- » Is essential to the long-term relevance of orchestral performance and the viability of the institutions that support it.
- » Is imperative for meaningful, authentic, and relevant relationships with communities.
- » Is fundamental to creating cultures where creativity flourishes and all staff, musicians, and boards are supported in bringing their full identities into their orchestras.
- » Is necessary for the innovation that orchestras must pursue to adapt to their changing environment and to be fiscally secure and artistically vibrant.
- » Is vital in attracting and retaining the highest levels of talent to all dimensions of orchestras—musicians, staff, boards, and artistic leadership.
- » Is foundational to upholding the principles of equality and fairness inherent in creating a more just society.

In support of these aims, the League wishes to strengthen its internal knowledge, understanding, and practice of EDI with an approach that humbly acknowledges that answers may be elusive and the process to getting them uncomfortable. We aspire to undertake the work of EDI with openness, objectivity, and deep institutional commitment and be transparent in our communications with all stakeholders and grow our ability to be candid about the challenges and opportunities we face in becoming a more equitable institution, realizing that EDI is a sustained and nonlinear practice that embeds equity across our organization.

## 2. Goals and Objectives

- » Build the League board and staff's understanding and practice of EDI principles, and increase their capacity to support diversity and equity across our field
- » Nurture alignment and partnership between board and staff constituencies
- » Provide a consistent base of knowledge, understanding and language across the organization
- » Support the League's work promoting diversity and equity across our field

### 3. Scope of Services

#### 3.1 Consultant Activities

To achieve the goals of “Joint Staff and Board Training Series,” we anticipate Consultant(s) to engage the League in the following activities:

- » Initial high-level research phase including discussion with representatives from staff and board
- » Baseline assessment of board and staff competency
- » Briefing chosen speakers/facilitators in advance of sessions
- » Delivering the following:
  - A summarized document describing findings of research/assessments
  - Proposed recommendations for a six-month training series
  - An outline of possible subsequent trainings for a further six month period.
  - A series of recommended self-directed resources and ongoing training activities that can be made available to current board and staff as well as new members during onboarding processes
- » Share best practices and methodology with staff leadership in order to build the League's capacity for continuing staff EDI learning.

#	Activity	Description	Date	Payment to Consultant
1	Engagement with Consultant Begins	Kick off meeting with primary contact discussing:  - Finalized plans, scheduling, consultant needs, limitations, etc.	Oct 1	25% of contract value
2	Activity/Deliverable 1	Meeting with primary contact discussing:  - Summarized document outlining findings - Proposed recommendations for training series along with schedule for delivery	Nov 19	25% of contract value
3	Activity/Deliverable 2	Meeting with primary contact discussing:  - Recommendations for six additional trainings and potential consultants/entities to deliver them	Feb 4	25% of contract value

4	Activity/Deliverable 3	Final meeting with primary contact and select staff members discussing  - Final observations, recommendations for shared best practices for ongoing learning and capacity building	Mar 4	25% of contract value
---	------------------------	--	-------	-----------------------

### 3.3 Consultant Qualifications

The consultant, through their proposal, should describe their philosophy and approach to EDI and to delivering the services. Consultant should demonstrate an understanding of the League’s context, mission and vision, and the key issues and stakeholders related to achieving the goals and objectives of the project. The consultant should provide an appropriate methodology and work plan for completing the project within the specified timeframe.

In addition, the consultant should provide evidence of the ability to undertake the activities outlined in this request for proposals, including:

- » Evidence of a breadth and depth of knowledge of EDI philosophies, approaches, and practices;
- » Knowledge of the universe of consultants available to deliver this work
- » Experience working on projects of similar size, scale, and/or scope; and
- » Proven analytical and research skills, facilitation skills, exceptional written and verbal communication skills, and any other specialized knowledge necessary for completing the project successfully.

### 3.4 Reporting, Communications, and Accountability

The selected consultant will be required to liaise closely and work in collaboration with the Project Team Committee, which will be a small group including members of the Board EDI Committee and the Staff Equity Team. The selected consultant will keep Simon Woods, President and CEO informed of progress of the work and timelines, as agreed upon and scheduled.

## **4. Project Budget**

Subject to the satisfactory completion of the services, the League shall pay the selected consultant up to \$20,000 to complete this work, according to the payment schedule identified above at Clause 3.3. Consultant is required to prepare a detailed budget when submitting their proposal, including consultancy fees and administrative support charges, with unit cost and the number of hours/days proposed to be devoted to the project.

## **5. Conflict of Interest**

At the time of submitting a proposal, consultant agrees there is no conflict of interest (real or perceived) unless specifically and clearly identified in their proposal with a recommended plan to manage the conflict of interest. Conflict of interest can be defined as any situation in which an individual or organization is in a position to exploit his/her professional or official capacity in some way for personal or corporate benefit.

The consultant agrees to notify the League immediately if an actual or potential conflict of interest arises.