



BAR ASSOCIATION
OF ERIE COUNTY

Organizational Equity Audit RFP

Request for Proposal

Bar Association of Erie County/Erie Institute of Law (collectively the “BAEC”) Organizational Equity Audit

The BAEC invites interested and qualified consulting firms or individuals to submit a proposal to conduct an organization-wide equity audit of the organization’s bylaws, events and educational programs, governance and committee structure, organizational partnerships, communications, business practices and membership practices (Collectively “Programs, Policies and Services”) as they reflect and/or pertain to the BAEC’s goal to embed diversity, equity, inclusion and belonging into its culture and support these values in the broader community. The Equity Audit Working Group will oversee the audit process with final policy decisions made by the Board of Directors.

Organizational Overview

The BAEC is a nonprofit 501(c) (6) membership organization with a mission to serve our members by educating, pursuing justice, and fostering camaraderie, wellbeing and belonging. The BAEC was founded over 136 years ago and presently has over three thousand members, primarily lawyers residing and/or practicing in Erie County NY. We completed our first strategic plan in 2023. The contents of that plan are available at <https://eriebar.org/about/missionstatement/>.

The BAEC has eight full-time staff (one part-time) and sixteen elected board members. Approximately thirty volunteer committees implement the strategic plan, concentrating on ensuring that members are up to date on specific practice areas. Programs operated by the BAEC, staff and volunteers include continuing legal education, recognition programs, pipeline programs, judiciary partnerships and

ratings, and wellbeing programs. Please view the BAEC website for further information at eriebar.org.

Vision & Brand Promise

To achieve excellence in the practice of law and the pursuit of justice. We have an unwavering dedication to building legal communities where all members thrive. We aspire to instill confidence, pride, and a sense of belonging within our membership.

Guiding Principles

Respect for the rule of law

Civility

Inclusion

Integrity

Leadership

Equity

Background

In 2023, the Board approved a strategic plan with the following goal:

Embed diversity, equity, inclusion and belonging in our culture and support these values in the broader community. The plan provides that the Board will conduct an Equity Audit to understand where to prioritize efforts to achieve the articulated goal.

Recent equity work includes the following:

- Incorporation of equity values into the Strategic plan and Mission, Vision and Values
- Support of a diversity, equity and inclusion committee
- Participation in pipeline programs such as Say Yes and Mock Trial
- Partner in the Empire State Legal Diversity Job Fair
- Partnership with affinity bar associations
- Incorporation of values into HR practices & member and business communications
- Educational awareness programs

Proposal Overview

As a continuation of its commitment to equity, the BAEC seeks a consulting firm or individual(s) to engage in a comprehensive, organization-wide audit, which will culminate in a concise practical report with recommendations and observations of how to meet our strategic DEIB goal.

Scope of Work

The BAEC prefers that work be conducted over approximately four (4) months with a flexible start date. We are amenable to considering adjusting the period to meet the consultant's schedule as well as considering additional work in separately agreed upon budgeted phases over a more extended period.

The equity audit will focus primarily on analysis of the *organization's bylaws, events and educational programs, governance and committee structure, organizational partnerships, communications, business practices and membership practices*. It will include a review of the above categories and recommendations for change. Efforts will be made to understand the historical underpinnings of Programs, Policies and Services assessed. The audit will also include interviews with key stakeholders. Surveys or focus groups will be conducted as needed subject to cost constraints.

Project Deliverables and Desired Outcomes

- Qualitative and quantitative observations and assessment about the BAEC's current Policies, Programs and Services. The deliverable will include a summary of stakeholder perspectives and expectations for future organizational culture change in relation to equity programming and practice.
- A comprehensive written report of the audit detailing its process, key themes, analysis of the gaps and disconnects between the current and future/desired state of the organization, and opportunities to build upon. The report should include recommendations for embedding new inclusive policies and practices into the organization's culture and into all Programs, Policies and Services (as noted above) of the BAEC including achievable short-term action steps and sustainable, long-term goals.
- We hope to receive clear actionable guidance on:
 1. What areas we need to improve.
 2. How to prioritize areas for improvement to achieve maximum results.
 3. Specific strategies to implement to improve in those areas.
 4. Using metrics to analyze results.

Budget: Negotiable range aligned with project deliverables and outcomes. Work may be proposed in phases to accommodate our budgeting process. Fixed fees preferred aligned with specified deliverables.

Proposal Instructions

The proposal should include the following and be no longer than four (4) pages:

- A work plan describing methodologies, approaches, and roles and responsibilities for how the work will be accomplished
- Detailed description of deliverables and outcomes
- Timeline
- Estimated costs
- Experience providing consulting services, including audits or assessments related to racial equity/diversity/inclusion/cultural competency
- Experience and philosophy regarding your work as part of a multicultural/multiracial team
- Relevant experience in the association/membership sectors
- Professional training and short bios of the proposed project team members
- A sample list of past and current clients
- Contact information for a minimum of three relevant references

Proposal should be limited to four pages (excluding supplemental attachments) and emailed to Anne M. Noble, Executive Director at anoble@eriebar.org on or before August 9, 2024.

Any questions regarding this proposal should be directed in writing to Anne M. Noble at anoble@eriebar.org.