



**City of McMinnville
Assessment Initiative
Advisory Committee Meeting #1
Thursday, March 14, 2024
3:00 - 4:00 PM**

**Organizational
(CMAI)**

Location: Civic Hall (200 NE 2nd St, McMinnville OR 97128)

Zoom:

<https://mcminnvilleoregon.zoom.us/j/85187967814?pwd=bklTcHFoT1hscW5obXBEZ0tyT29lZz09>

Meeting ID: 851 8796 7814

Zoom Password: 064202

Phone: +1 253 215 8782 (US)

Meeting ID: 817 1459 4776

AGENDA - DRAFT

1. Welcome and Introductions (including public members) - Co-Chairs
2. Level Setting – Talitha Consults
3. Initiative Overview – Talitha Consults
4. Next Steps
5. Adjourn

UPCOMING

- City Council Work Session w/Talitha Consults: Tues., March 26, 2024, 6-7pm
- CMAI AC MEETING #2: Thursday, April 11, 2024, 3-4 PM

CMAI ADVISORY COMMITTEE (AC)	
Representing	Name

Please submit requests for accommodations, including interpretation for people who are deaf or hard of hearing, at least 48 hours before the meeting to Noelle Amaya, Communications & Engagement Manager (503) 883-3727.

Diversity, Equity, and Inclusion Advisory Committee	Larry Miller (he/him) – Co-Chair Caitlin Nemeth (they/them) – Co-Chair Tony Lai (he/him) Efrain Arrendondo (he/him) Christine Bader (she/her) Abby Thomas (she/her) Vivana Garibay (she/her) Katherine Lee Martin (she/her) Nancy Macias (she/her/ella) Councilor Zack Geary - Liaison
Talitha Consults (Consultant)	Charis May Hnin Carol Rozumalski, <i>may join remotely</i> Eugene Marmaziuk
Committee Staff (City)	Noelle Amaya (she/her) Jody Christensen (she/her)

Questions, comments, or more information, contact Jody Christensen at jody.christensen@mcminnvilleoregon.gov or Noelle Amaya at noelle.amaya@mcminnvilleoregon.gov

Please submit requests for accommodations, including interpretation for people who are deaf or hard of hearing, at least 48 hours before the meeting to Noelle Amaya, Communications & Engagement Manager (503) 883-3727.



Timeline

February - End of September 2024



PHASE 1	Task 1.1 to 1.3 March to May Deliverable: <ul style="list-style-type: none"> • A graphic summary attached to a written report. • A summary document and presentation of key learnings from mixed-method engagements. 	City Council Work Session: March 26 DEIAC Meeting: March 14 April 11 May 9
	Task 1.4 June Deliverable: <ul style="list-style-type: none"> • Final needs assessment report including Strengths, Challenges, Opportunities and Risks (SCOR) 	DEIAC Meeting: June 13
	Task 2.1 June to August Deliverable: <ul style="list-style-type: none"> • Organizational Assessment: Diversity, Equity & Inclusion Report (1st draft) 	DEIAC Meeting: July 11 August 8
PHASE 2	Task 2.2 September Deliverable: <ul style="list-style-type: none"> • Organizational Assessment: Diversity, Equity & Inclusion Report (FINAL draft) • Presentation to the Council with DEIAC & the Project Team 	City Council Work Session: September 24 DEIAC Meeting: September 12

**DEIAC = Diversity Equity Inclusion Advisory Committee



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February 15, 2024

Noelle Amaya, Communications and Engagement Manager
City of McMinnville
230 NE Second Street
McMinnville, OR 97128

Request for Information 1.0 (RFI) – City of McMinnville Organizational Assessment: Diversity Equity & Inclusion

Dear Noelle,

On behalf of Talitha Consults (Talitha), we are excited to begin work on McMinnville's organizational assessment on diversity, equity, and inclusion. Task 1.1 of the project includes a landscape assessment and a review of pertinent documents. The enclosed RFI describes the content we require to understand the city's posture on mitigating systemic racism both internally and externally. By taking a deep dive into your materials, data, and policies, we will create a preliminary findings document that will describe how well-positioned the city is to achieve the goals stated in the MacTown 2032 strategic plan.

We have organized the attached RFI into two categories: internal-facing materials and external-facing materials. With each category, we have guiding questions to identify materials relevant to the preliminary review.

Please upload as much info as possible via email by **March 7, 2024**. Once we have a shared drive set up with the City's IT department, feel free to upload the materials there. I believe that perfection is the enemy of good. I see that the two of you are trying your best to do good work. For that, I am tremendously grateful.

Let us press on together!

Sincerely,

Charis M. Hnin

Principal & Chief Strategist
Phone: 1-888-825-4842 ext. 0 | 206-446-4378
14900 Interurban Ave S #271 | Tukwila, WA 98168
Email: charis@talithaconsults.com

Encl: 1. Request for Information – City of McMinnville
2. Staff by Department Template



Request for Information – City of McMinnville

Internal Diversity, Equity, and Inclusion (DEI) Posture

Workforce Information

To better understand employee experiences, organizational strengths, challenges, opportunities, and risks, we are requesting to review the following materials and information:

- Employee Handbook** – Please confirm that [mcminnville employee handbook 2023](#) is the current version and the date it was last revised.
- Workforce demographic statistics (if any)** – Please include the date last collected.
- Workforce satisfaction survey results from the last 5 years (if any)** – Please include the dates collected.
- Departmental statistics** – For all seven departments, provide how many full-time, part-time, and on-call employees.
We have provided a template for your use and reference. This template was created with the assumption that there are seven departments within the City. Please feel free to modify the template as you see appropriate, especially to provide additional information you think is relevant for us to know.
- Pertinent documents** – Documents that will help the consultants better understand the City's approach to:
 1. Personnel management (e.g., recruitment, retention, employee relations, and training)
 2. Administration (e.g., practices, policies, procurement, and contracting)

Policies related to diversity, inclusion, and equity principles specifically for the city staff and leaders

- MacTown 2032 Report**
- Other Pertinent documents** - to deepen the consultants understanding of how DEIA values are being operationalized within the city.

Guiding questions on internal diversity, equity and inclusion

Here are some guiding questions to consider as you gather the documents. We understand that MAC 2032 offers some foundational values and guidance to integrate and equity into the city's operations. Our questions include:

1. Are there shared definitions for Diversity, Equity and Inclusion (DEI) accepted and adopted city-wide? If so, share the document that describes shared definitions for DEI.
2. How have the seven departments within the city been tracking or monitoring progress made in the areas of DEI since the launch of MacTown 2032 in 2019?
3. In the last five years, have city employees, boards, commissions, and committees gone through cultural competency and fluency training? If so, please share the type of training and whether the training was optional or mandatory.



External Diversity, Equity, and Inclusion (DEI) Posture

Policies, procedures and processes guided by diversity, inclusion, and equity values and principles

Diversity Equity and Inclusion Advisory Committee (DEIAC) documents - From our preliminary research, we understand there are 9 supporting documents associated with the listed on the [DEIAC webpage](#). We request the city share **additional documents**, if any.

Compliance plans – including, but not limited to:

- American Disabilities Act
- Language Access Plan (Executive Order 13166, "Improving Access to Services for Persons with Limited English Proficiency")

Equity lens document – Referenced at the February 8, 2024, DEIAC meeting. We'd like to inquire:

- Is this document available for review? If so, please share it with us.
- How did this document come about?
- Who was the lead author(s) or co-author(s) of this document?
- Has the document been approved by DEIAC? If so, when? If not, why not?
- Has the document been adopted by the City Council? If so, when? If not, why not?

The reason we asked these questions is two-fold: 1) to understand whether the equity-lens document was created for and by DEIAC and why; 2) the document's intended function, such as *how* and *when* to use this document and for *what purpose*.

McMinnville meetings webpage – Please confirm the [McMinnville meetings webpage](#) is where DEIAC public meeting minutes and some video recordings are archived and where DEIAC materials can be accessed.

Related board materials, minutes, or video recording(s) – To deepen our understanding of the DEIAC's involvement in creating this RFP (Organizational Assessment: Diversity, Equity, and Inclusion.) Please share those materials. The point here is to discover whether there is a backstory. You can just simply point us to a web link to the materials so we might learn more information.

Guiding questions on external diversity equity and inclusion

1. Are there pertinent documents that will deepen our understanding of DEIAC's formation, appointment, application and approval process, recruitment and position vacancy announcement, associated ordinance(s), resolution(s), guiding documents to describe the committee's goals, values, priorities, roles and responsibilities?
2. Are there external facing initiatives to engage with the City's diverse needs and customer base? (e.g., policies or plans in place to comply with and improve access to increase public participation with the City government)



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Response to City of McMinnville's Organizational Assessment: Diversity, Equity, & Inclusion RFP

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Statement of Interest

Noelle Amaya
Communications & Engagement Manager
Noelle.Amaya@mcminnvilleoregon.gov

November 14, 2023

Talitha Consults (Talitha) is pleased to submit our team's qualifications for the City of McMinnville's request for proposals for its Organizational Assessment: Diversity, Equity, & Inclusion project. Talitha knows the City of McMinnville. We are currently supporting the City's initiative to update the Parks, Recreation and Open Space Plan (PROS) in partnership with MIG Inc. We commend McMinnville (MAC) for leading with racial justice, prioritizing the production and co-creation of knowledge using reliable and valid data, and applying the knowledge from the multifaceted, lived realities of diverse communities in the design and implementation of MacTown 2032.

Talitha Consults is a woman of color-owned and operated business with a DBE (Disadvantaged Business Enterprise) certification from the Office of Minority and Women Enterprise in Washington state, licensed to do business in both Washington and Oregon. The proposed team for this project is dynamic and brings over 65 years of collective experience in advancing the goal of eradicating institutional racism, bias, and inequities. Our team is diverse in race, ethnicity, places of origin, age, sexual orientation, immigration status, linguistics, disability status, and cultural upbringing. Collectively, we are fluent in fourteen languages, including the most spoken languages in Oregon, such as Spanish, Vietnamese, and Russian. Our diverse lived experiences and multidisciplinary backgrounds are proven assets for DEI-centered organizational assessments and implementation plans. The Talitha team believes that bias, racism, and anti-blackness are global emergencies and should be approached carefully and intentionally.

Our team aligns with the goals of McMinnville's commitment to dismantle the barriers of racial inequity and address it head-on and organization-wide by "align(ing) its DEI strategy with partners and relevant community-based organizations to ensure DEI strategies complement current and future DEI-related work throughout the service area."

Our team's unique approach balances accountability and diligence with love and compassion. All of our facilitation and engagement activities create a safe space to share, grow, learn, and understand. Our approach has enabled our clients to realize authentic change and partner with us to co-create sustainable tools, ideas, and conversations with the communities to continue this work for years to come.

To that end, Talitha welcomes the opportunity to partner with McMinnville. The Talitha team is confident that with the continuous partnership, we can spark conversation, build community, and drive action to positively impact historically marginalized communities—Our Communities. We look forward to hearing from you. We also acknowledge receiving all the amendments issued for this RFP.

Sincerely,
Charis May Hnin
Founder & Principal Consultant

Talitha Consults | charis@talithaconsults.com | www.talithaconsults.com |
UBI: 604227665 | DBE: D4F0026431 | Oregon BIN: 01862452-5

1. Qualifications and Experience

A. EXPERIENCE OF THE TEAM

Talitha Consults is uniquely qualified to lead organizational assessments in partnership with municipalities. We are a woman-owned, multicultural, multilingual team with experience leading and developing strategic plans with measurable goals, culturally grounded organizational assessment, and high workforce participation. Talitha's impact in developing equity-based assessment strategies and recommendations has benefited organizations across the United States. Talitha is a "one-stop" firm that can deliver a full range of strategic advising services. Collectively, Talitha team members speak fourteen different languages, including Swahili, Spanish, Somali, Arabic, Chinese, and French. In the last year, the City of Vancouver, WA, Utah Transit Authority, City of McMinnville, and Bend Parks and Recreation District, amongst others, also engaged us to support DEI-centered organizational assessments and recommendation development, community engagement, professional development, and strategic planning services.

We are a team of interdisciplinary and multilingual professionals supporting public and social impact organizations with equity-centered community planning, strategic capacity building, and transformative community engagement. Charis May Hnin, Principal and Founder of Talitha, has often been called on by community leaders and public officials across the nation for consultation and support to launch multi-sector partnerships and collective impact strategies, specifically to promote thoughtful regional development. The proposed team on this project includes the following team members:

Charis May Hnin | Project Manager **MA in Community Planning | University of Washington (Tacoma)**

Charis M. Hnin is a motivational leader, strategist, seasoned facilitator, learner-centered teacher, community organizer, and entrepreneur. She pays close attention to the interconnections between people, place, process, and power in her community planning practice, and this approach enables her to be grounded, strategic, visionary, and effective in serving the needs of her clients. Her community partnership and mobilization efforts have been recognized in the August 2016 issue of the Seattle Met and the South Sound Business Journal. Her industry experiences include holding front-line and leadership positions in community development, housing, consumer protection, human services, educational leadership, workforce education, change and growth management, and international business. Her experiences living and working abroad enable her to connect with people across cultures meaningfully. Charis believes that equitable and sustainable community planning is a multi-sector effort. Guided by this principle, she intentionally founded Talitha Consults with trusted experts from diverse industries who are also committed to the same principle. Charis will oversee the entirety of the project as a project manager, ensuring contract compliance and a timely completion of the project within budget.

Carol Rozumalski, MEd, MSW | Deputy Project Manager– Disability Justice **Master of Social Work | University of Washington** **Master of Education | Seattle University**

Carol is a creative and dynamic project manager who uses her love of connecting with people to form trusting relationships and to support community-based activism. Carol has led large-scale projects to expand non-congregate sheltering options, improve service integration for youth and young adults experiencing homelessness, and increase trauma-informed homeless outreach in Seattle, Washington.

Undaunted by trying new things, Carol has embraced iterative processes to improve access to transitional housing, eliminate barriers to permanent housing, and improve service outcomes for BIPOC communities. Currently, Carol is leading workplace culture work, equitable budgeting strategies, and strategic planning at the City of Seattle Department of Neighborhoods. A leader from a young age, Carol was the first wheelchair-using student to attend Liberty High School and proved students with disabilities could be fully included in all aspects of student life. With ongoing determination, Carol uses her expertise in Section 504/ADA to ensure public-serving programs are accessible to all. Carol will offer strategic advice through the lens of disability justice.

Eugene Marmaziuk | Project Coordinator

BA in Business Administration | University of Washington (Tacoma)

As a first-generation Ukrainian-American immigrant, Eugene developed a holistic understanding of the intricacies and needs of low-income households, underserved populations, immigrants, and refugees. In his areas of study, Eugene graduated from the University of Washington (Tacoma) with a magna cum laude BA in Business Administration – Management. At the University of Washington, he developed and demonstrated strong research and writing skills, which enlisted his interest in underserved community initiatives. His passion for underserved communities has led him to pursue two minors in economics and nonprofit studies. His research interests at the University of Washington focused on diversity as well as learning about inequity issues in society. His role at Talitha Consults led him to support many centered project projects; with his linguistic abilities, he helped develop community engagement efforts and language access assessments, coordinating outreach and managing projects. On the projects, Eugene provides his expertise to the project team with data management and community engagement planning, quantitative analysis, and multicultural and multilingual insights, as well as helping manage the firm's everyday operations. As a manager in business operations and executive support, he tackles managing the day-to-day operations of Talitha Consults – from data management and IT to pursuing business development opportunities.

Luz Boys | Community Partnership Advisor & Bilingual Spanish Facilitator

MA in Applied International Studies | University of Washington

Luz supports Talitha with designing and implementing multicultural, multilingual, and multifaceted stakeholder engagement. Luz also brings extensive leadership and front-line experience in community development, specifically in Southern California. Her extensive experience living and working abroad has afforded her an impeccable ability to observe, synthesize and analyze discourse analysis based on empirical data and methodical research. In doing so, she can generate the most useful and actionable insights for her clients. Luz also brings excellent business acumen and impressive marketing skills to the team. Luz will support outreach and engagement activities with Spanish-speaking communities. She can provide translation and interpretation services for the team as needed.

Beryne Odeny, Advisor, Sr. | Research & Implementation Science

MPH & Ph.D. | University of Washington

Dr. Odeny will support quality assurance with impact and needs assessment through the lens of implementation science. As a global health and equity leader, Dr. Odeny has a track record of successful global, multisectoral collaborations with public sector leaders, community leaders, program managers, scientists, clinicians, patient groups, and funding agencies, among other stakeholders. Dr. Odeny excels in guiding organizations to translate data into meaningful information for transformative programmatic and policy impact. This, coupled with her expertise in clinical research, operations research, and analytical skills, equips Dr. Odeny with holistic guidance and insights to multisectoral

clients that Talitha supports. Dr. Odeny is a medical doctor with a degree in Medicine and Surgery from the University of Nairobi, Kenya, and a Master of Public Health degree in Global Health and a Ph.D. in Dissemination and Implementation Science from the University of Washington. For this project, Dr. Odeny will lead quality control and quality assurance (QA/QC), guided by the best practices from the implementation science field so that key deliverables from Talitha are effective, meaningful, and sustainable, with measurable goals along the process.

**Jonathan Joseph | Racial Equity and Social Justice Advisor
MA in Public Health & Urban Development | University of Washington**

Jonathan has deep roots in the community and continues his passion for community advocacy, working to elevate the lived experience of people to policy and decision-making systems. Jonathan graduated from the University of Washington with a double masters in urban planning and public health. His works focus on understanding how the built environment and policy and actions within communities, affect the economic, educational, and health outcomes for individuals. As a melanated, multilingual immigrant to the United States, Jonathan experienced the challenges of systemic oppression and has used that experience to root his work in undoing historically systemic oppression and providing direct service to communities. In his current role as Executive Director of Tukwila Children’s Foundation, he has worked to foster an organization grounded in the experience of students and families in the community. His work has helped create actionable systems that decolonize wealth, provide direct service aid to students, and elevate student voices to state education policy boards. Jonathan uses his experience to build trusting, authentic relationships in the community, partnering together to find creative solutions. Jonathan will advise the team on equitable community engagement with young people and vulnerable populations.

B. COMPARABLE PROJECTS

In the last three years, Talitha Consults supported the following agencies with organizational assessments, assessment analysis, and developing and prioritizing recommendations:

City of Vancouver (WA) (2023-Present): The City of Vancouver, WA engaged Talitha to support the Office of Diversity, Equity & Inclusion Department with the development of a city-wide Language Access Plan (LAP). Although still in its initial stages, the project approach entails four key phases somewhat similar to that of MAC’s DEI organizational assessment—1. Review and assess the current landscape of city-wide materials and engage with various stakeholders through a mixed method engagement in order to gather insights, including in-depth interviews, community outreach, and public community survey; 2. Provide qualitative and quantitative analysis; 3. Develop an LAP with recommendations and prioritization of recommendations; 4. Train employees on the LAP to support the implementation. The project is currently between phases 1 and 2.

City of McMinnville (OR) (2022-Present): Talitha recently delivered a Community Involvement Strategy not only to support the revised Parks, Recreation, and Open Space Master Plan but also to inform and augment the City’s overall engagement and communication strategies. In partnership with the city staff and MIG Inc.—the prime consultant—Talitha designed and implemented mixed-method community engagement strategies, including in-depth individual interviews, a listening session with stakeholders, provided a facilitation guide for conversations with teens and supported the development of two multilingual community surveys.

Utah Transit Authority (UT) (Jan-October 2023): In 2023, Utah Transit Authority engaged Talitha to perform an organizational assessment and update the agency’s community engagement strategic plan. Building off the current landscape assessment, Talitha developed an agency-wide community engagement strategic plan for the next five years shaped by holistic feedback and data gathered from UTA’s internal/external stakeholders and users.

Green Mountain Transit (VT) (2021-2022): Green Mountain Transit is the largest bus operator in Vermont and Talitha designed and implemented a series of multi-day agency-wide Justice, Equity, Diversity, and Inclusion workshops. Approximately 225 participants attended the workshops, including bus operators, maintenance staff, administrative staff, executive leadership, community representatives and board members. Talitha conducted a series of in-depth individual interviews, small group discussions, and an internal agency survey to assess GMT’s organizational values and climate landscape of GMT and used the results to identify training priorities and plan workshop content. Key findings from the needs assessment were applied to create a curriculum that connected to a diverse audience and was relevant to a wide range of roles, identities, and lived experiences. Post-workshop outcomes reported that participants had increased self-awareness, confidence, and ability to work in diverse groups and build positive community relationships. In addition, Talitha developed racial equity tools for the GMT board and various departments to use in their long-term strategic planning.

Bend Parks and Recreation District’s Diversity, Equity and Inclusion Assessment (OR) (2020-2021): Bend Parks and Recreation (BPRD)—one of the largest park districts in the State of Oregon, engaged Talitha to lead an organizational assessment on diversity, equity and inclusion. Areas of inquiry included the organization’s current values, culture and climate, internal relationships, and community satisfaction. Assessment results were used to make recommendations for equity-centered services and organizational change. The final report also included actionable recommendations and practices for future parks, recreation, and open space planning. The fifteen-month project also included engaging staff, park patrons, and community members to identify successes and barriers in accessing park and recreation services. Talitha conducted numerous individual in-depth interviews, focus groups and one community-wide survey in both Spanish and English, through which 940 unique survey takers participated. The final report was presented and unanimously accepted by the district’s board of directors in January 2022. Talitha’s staff also translated the final assessment report into Spanish.

References:

We included the following references; refer to the previous section for full project descriptions.

Reference 1: City of McMinnville, OR

- **Contact Name:** Susan Muir, Parks and Recreation Director
- **Address:** 230 NE Second Street, McMinnville, OR 97128
- **Phone:** (503) 434-7310
- **Email:** susan.muir@mcminnvilleoregon.gov

Reference 3: Bend Parks & Recreation District, OR

- **Contact Name:** Bronwen Mastro, PLA, LEED BD+C, Landscape Architect
- **Phone:** Direct (541) 706-6152, Office (541) 389-7275
- **Email:** bronwenm@bendparksandrec.org

MIG Inc. | Prime Contractor for PROS Plan

- **Contact Name:** Jon Pheanis, AICP, Principal & Director of Portland Operations at MIG (Prime Consultant on the Project)
- **Address:** 506 SW 6th Ave, Suite 400, Portland, OR 97204
- **Phone:** (503) 297-1005 ext. 2120
- **Email:** jonathanp@migcom.com

Reference 4: Utah Transit Authority

- **Contact Name:** Megan Waters, Community Engagement Director
- **Email:** MWaters@rideuta.com

Reference 5: City of Vancouver, WA

- **Contact Name:** Diana Betancourt Macias, Diversity, Equity, and Inclusion Coordinator
- **Address:** 415 W 6th St, Vancouver WA 98660
- **Email:** Diana.BetancourtMacias@cityofvancouver.us

2. Approach for Organizing and Accomplishing Tasks and Activities

A. PROJECT UNDERSTANDING

Through our recent interactions with the City of McMinnville (MAC) for the PROS plan update, we have witnessed that the City understands the significance of aligning its DEI strategy with understanding and responding to community needs, be it responding to individual residents, community-based organizations, or other institutional/organizational partners. We see that the City is grappling with these key questions—

1. How do we show up for the community in a way that ‘create(s) a culture of acceptance and mutual respect that acknowledges differences and strives for equity’?
2. What do we need (capacity and resources, both tangible and intangible) to get to where we want to go?
3. How do we know whether and to what extent the City has progressed?
4. Who gets to define McMinnville’s success in DEI postures and initiatives?

The City’s Engagement and Inclusion Priority also offers a tangible framework to align its DEI strategy with its operations.

Talitha understands that the final deliverables are an assessment report summarizing strategies and goals for the City based on assessment findings and help develop prioritization and recommendations that meet the five objectives in MacTown 2032.

Collectively, we bring approximately 65 years of direct experience in equity-centered strategic planning and organizational assessment, coupled with promising practices through the DEI lens. Our work utilizes unique strategies to elevate the voices of historically marginalized and underrepresented communities, especially in governance and policy planning. Our team’s diverse lived and professional experiences and multicultural backgrounds will further enrich the connection we build with the community at large.

Our proposed response includes careful research and review of current policies, procedures, and programs in before we launch into action. From our extensive experience, in-depth individual interviews with internal and external stakeholders have proven to be highly effective in gaining a

deeper understanding of community needs, institutional strengths, and growth areas. Because of our team's multilingual skills, we can also conduct these interviews in languages other than English if necessary. For recruitment, we will use multilingual and multicultural communication methods to disseminate information.

We will ensure that our deliverables—organizational assessment, analysis, report, and presentations—are guided by the universal design to increase inclusion. We want to comfort McMinnville – many resources are available that will empower this work. Therefore, we want to highlight that while this work may feel intimidating, Talitha is ready to bridge McMinnville with resources and expertise that fulfill its project's anticipated vision.

B. APPROACH TO WORK:

Our extensive experience designing and implementing equity-centered language access services, strategic planning, and professional development has taught us that **embedding DEI principles in government is a science and art process**. It also requires intentionality, patience, and investment of time and resources. Guided by carefully researched results and goals communicated through the initial inquiry process, our integrated project approach carefully balances trauma-informed planning, culturally grounded facilitation, and support. We have embedded authentic and timely feedback mechanisms throughout the planning process.

Implementation Science Framework to guide Program Implementation, Quality Assurance, and Quality Control (QA/QC): Talitha uses RE-AIM, an analysis tool used to measure five dimensions: Reach, Effectiveness, Adoption, Implementation, and Maintenance / Sustainability. Our clients greatly benefit from this approach because Talitha delivers reliable and evidence-based outcomes and because they have access to a replicable evaluation and planning tool to advance Equity and Social Justice.

Research framework and literature to guide the research and assessment process:

At Talitha, we regularly use the socioecological framework when supporting public agencies of varying sizes with public engagement needs. This framework is also useful for identifying areas of opportunity, gaps, and barriers in the advancement of DEI values within an organization. Each element in this framework will help ensure that proposed methods for McMinnville are carefully planned and implemented in an integrated fashion so that one day, DEI principles become an integral part of the City's core values and mode of operations, not just a program or a project with start and end date. We have utilized the Government Alliance on Race and Equity; Race Forward: The Center for Racial Justice Innovation's Racial Equity Impact Assessment Toolkit and resources from Othering and Belonging Institute.

Dissemination of Communication: When it comes to disseminating communication, we pay close attention to informal and formal channels to engage, elevate and empower individuals and businesses from historically disadvantaged and underrepresented communities. We plan to notify this partnership opportunity with the Metro through ethnic radio stations and news outlets, worship centers, formal and informal leaders from refugee and immigrant communities, ethnic food trucks and restaurants, refugee resettlement agencies, developmental disability support agencies, language-specific and cultural liaisons from K-12 institutions, ethnic chambers of commerce, trade and community colleges and young-people serving agencies. Additionally, we will augment our outreach efforts with digital

notifications to gatekeepers who manage listservs for COVID-certified firms, such as the Office of Business Inclusion and Diversity, ethnic and cultural chambers of commerce, refugee resettlement organizations, and immigrant resource centers.

C. WORK PLAN & DELIVERABLES

The following is our proposed work plan and deliverables based on the scope provided in the RFP. In consultation with the KCLS team, we will co-create (trans-creation) deadlines and responsibilities to set clear project expectations and objectives; at the moment, we've set estimated timelines based on the RFP deadlines.

Phase 0: Project Management (ongoing)

Task 0.0: Project Kick-Off

Activities: We will design and facilitate a kick-off meeting with city staff to select and confirm specific methodology, clarify the scope of work and project roles, establish the project schedule and communication protocols, and review the proposed approach and immediate next steps. Other objectives of this meeting will be to build community between the project team and the Talitha team.

Deliverables: Within a month of contract execution, one 1.5-hour virtual initial kick-off meeting – with the project team; within five business days of the kick-off meeting, a draft of the project's work plan will be submitted to the City for review and approval.

Value-added service

- Talitha uses project management software that we can share with the City. This platform makes it easy to track milestones/timelines and store deliverables and documents in one shared drive.
- Meeting minutes will be archived in a mutually agreed upon cloud-based shared drive. At Talitha, we use business G-Suite for document management – we can provide a shared drive at no additional cost. Nonetheless, we can work with the City's preference for any archival/storage management platform.

Task 0.1: Monthly Virtual Project Meetings with the DEIAC

Activities: Talitha's project manager plus 1-2 key team members will meet the DEIAC once a month for the entirety of the project. We will make ourselves available to support with agenda-setting as well as facilitation.

Deliverables: Virtual monthly project meetings, meeting agendas, and meeting minutes. As the project ramps up, the project meeting might happen twice a month.

Value-added service Talitha Consults is experienced with working with McMinnville's Diversity, Equity, and Inclusion Advisory Committee. Currently, in partnership with MIG Inc., Talitha Consults delivered a Community Involvement Strategy for the Parks and Recreation Department. We've worked with a few DEIAC members and the staff liaison throughout this project. We are aware of the dynamics, procedures, and facilitation processes with this committee.

Task 0.2: Monthly Virtual Project Meetings with the Project Team

Activities: Talitha's project manager plus 1-2 key team members will meet the project team once a month for the entirety of the project.

- The Consultant recommends regularly scheduled meetings (for example, on the third Tuesday of every month). Talitha will send the meeting agenda to the project team at least 48 hours prior to the meeting for review and approval.
- Charis M. Hnin, Talitha's project manager, usually facilitates these meetings. In her absence, Carol Rozumalski will support with facilitation.

Deliverables: Virtual monthly project meetings, meeting agendas, and meeting minutes.

Phase 1: Landscape Analysis & Organizational Assessment (1-5 months)

Task 1.1: Discovery Process

Activities: The Consultants will begin the organizational assessment process with a preliminary review of pertinent documents. In this phase, we will prioritize reviewing existing information that will help the Consultant better understand employee experiences, organizational strengths and weaknesses, DEI policies and processes and employee DEI competency and receptiveness. By taking a deep dive into your materials and data, including auditing prior accomplishments, current policies and procedures and workforce statistics as well as understanding demographics, trends, and issues that are relevant to the agency, the Consultants will be able to provide a thorough snapshot of the City's systemic racism mitigation posture in both internal and external environments.

Deliverables: Preliminary findings document. Here we will provide a preliminary finding report that includes a review of processes in place that enable the collection of disaggregated demographic data; the promulgation of fairness and diversity policy with the goal of aligning and centering MacTown 2032 DEI-centered goals and objectives in the City's operations, services, spaces and structures. This task is vital for the development of recommendations to enable City-wide transformation. Key activities include materials review, data assessment, and an audit of past and current initiatives.

Value-added service: A graphic summary attached to a written report.

Task 1.2: Design & Implement Organizational Assessment

Activities: Talitha Consults wants to empower our clients. Thus, we will conduct mixed-method internal and external engagement activities using non-proprietary tools and resources so that they are accessible to the public and available to the City to revisit on a regular basis after the initial assessment is complete. For example, the City will be able to reuse as well as adapt moderator's guides for in-depth individual interviews as well as internal assessment guidelines and worksheets after the initial assessment is complete.

At a minimum, a comprehensive engagement method should assess whether and to what extent the City's workforce and stakeholders are aware of the existing engagement and partnership efforts and practices within the organization. Also, assessing whether the workforce understands the relevance of meaningful community engagement in their day-to-day work is critical. By assessing these core areas, the City would be able to identify gaps in its DEI principles and practices. The assessment process should include how effectively the City has communicated to its employees on why the agency is prioritizing the five DEI objectives as a part of its strategic goals in the present context. All the

activities for this task are geared toward collecting quantitative and qualitative data needed to analyze the City's values and existing and emerging efforts as they pertain to DEI initiatives.

Talitha will apply the social justice and racial equity framework developed by the Government Alliance on Race Equity (GARE) in all our engagement activities. We'll pay careful attention to the interplay between cultures, power dynamics and values present within the City—both present and past. We will take into consideration the successes, challenges and complexities of implementing the MacTown 2032 Strategic Plan.

Task 1.3: Application of the assessment tool to each of the City's seven departments

Activities: Mixed Method Engagement Activities outlined below:

1. In-Depth Individual Interviews: Talitha Consults will lead a series of in-depth interviews (a total of 28 interviewees) held via telephone in English and Spanish or other languages on an as-needed basis.

- Total of 7 department heads
- Total of 14 department staff (2 staff per department)
- Total of 14 users or customers of City services (2 users per department) from historically marginalized communities.

2. Listening Circles with Internal Stakeholders: Talitha Consult will conduct a series of three listening circles for internal stakeholders to learn more about the internal efforts and to inform the stakeholders of future plans (recommendations and prioritization). We hope this step allows the City to enlist buy-in and creates a feedback loop where participants can provide their insights. *This proposed task (listening circles) is a value-added service; in the past, these sessions have proven effective in gaining internal support for DEI initiatives.

- One listening session to learn about the current landscape and inform them of this project and its process of developing recommendations
- One presentation and listening session to update about the key findings from current landscape assessment
- One post-assessment listening session to solicit feedback on prioritizing recommendations (ensuring that prioritization is both feasible and meaningful in the landscape of what each department/stakeholder does).

Deliverables: A summary document and presentation of key discussions from all three sessions.

Task 1.4: A comprehensive needs assessment, including a report summarizing DEI strategies and goals for the organization based on the results.

Activities: Talitha Consults will use the organizational assessment findings to develop a comprehensive report summarizing DEI strategies and goals for the City. This report will be the groundwork for prioritizing recommendations to help meet the five engagement and inclusion objectives in MacTown 2032.

Deliverables: Final needs assessment report, which includes a summary of DEI strategies and goals based on organizational assessment findings, multiple strategies for enhancing the City's relationships

with various partner agencies and organizations, and recommendations relevant to the City Engagement and Inclusion objectives. At Talitha, we call this report a ‘SCOR’ which stands for Strengths, Challenges, Opportunities and Risks.

Phase 2: Prioritization of Recommendations & Report (5-7 months; Anticipated completion of Spring 2024)

Task 2.1: Prioritization of Recommendations

Activities: Talitha will develop and submit a preliminary draft of the recommendations. We have embedded a feedback mechanism so the City and its diverse stakeholders can offer feedback throughout the development process. We will solicit stakeholder feedback to enlist strategies and ensure that the prioritization of recommendations is meaningful and actionable for the City.

- In this process, there will be one post-assessment listening session to solicit feedback on prioritizing recommendations. We will gather feedback from the stakeholders to ensure that prioritization is both feasible and meaningful in the landscape of what each department/stakeholder does. *Please refer to Phase 1, Task 1.3, for mixed-method engagement details.*

Deliverables: Talitha will submit preliminary, semi-final, and final drafts (with three revision opportunities). The final draft of the report/presentation will include prioritized recommendations that help meet the five Engagement and inclusion objectives in MacTown 2032, including but not limited to:

- a) Short and long-term priorities for each department to improve their cultural responsiveness, recommendations for capacity building, and service delivery improvements.
- b) Short and long-term training recommendations for all City of McMinnville employees.
- c) Short and long-term policy and procurement recommendations for the City of McMinnville.

Task 2.2: Final Deliverable Presentation to the DEIAC and the City Council.

Activities: Talitha Consults, in partnership with the project staff, will create a presentation with the work contained in deliverables from phases 1 and 2 and present the findings and recommendations to the DEIAC and the City Council.

Deliverables: Final presentation slides; presenting findings, strategies, and recommendations to the DEIAC and the City Council.

PROPOSED TIMELINE

	2023		2024						
Task	Dec	Jan	Feb	Mar	Apr	May	Jun		
Kick-Off Meeting 0.0									Phase 0
Task 0.1 & Task 0.2									Phase 1
Task 1.1									Phase 2
Task 1.2								★	Milestone
Task 1.3									
Task 1.4 ★									
Task 2.1									
Task 2.2 ★									

3. Approach and Abilities to Interact and Engage with Diverse Stakeholders

Charis and the leadership at Talitha are experienced and disciplined public speakers who have done extensive presentations to diverse constituents, stakeholders, and elected officials for a wide variety of topics, both in-person and online. In our work nationally and internationally, we have demonstrated our commitment to building support and gaining trust. Our approach stems from our values and commitment to engage with diverse stakeholders with cultural humility, racial equity & social justice, practicing radical inclusion, leading with meaningful community engagement (i.e., “to work with communities in a way that’s sensitive, supportive, inquiring and carefully analytical, challenging but not directive or patronizing” – Marie Kennedy, University of Massachusetts, Boston; and attentive & compassionate listening. We hope to do the same for the City of McMinnville communities and diverse stakeholders.

Additionally, to reduce barriers, we will accommodate stakeholders’ needs and accommodation requests. Collectively, Talitha team members speak twelve different languages, allowing us to provide translation and accommodation services per the client’s request. To demonstrate our commitment to reinvest in historically marginalized and overburdened communities and to honor their time/insights, we will offer stipends and/or grants to community partners and individuals in focused communities who participate in engagement events (participants from historically marginalized communities). These practices help us mitigate the participation barriers of time and income.

When it comes to disseminating communication and recruitment opportunities, we pay close attention to informal and formal channels to engage, elevate, and empower individuals and businesses from historically disadvantaged and underrepresented communities. This strategy is especially important for focusing our recruitment on historically marginalized communities - Black, Indigenous, Person of Color (BIPOC), immigrant/refugee, housing insecure, and non-English speaking community members.

4. Key Points of Input and Review with City Staff and the DEIAC.

Our extensive experience has taught us that process planning matters to complete the scope of work on time and within budget. Thus, we research and plan carefully before any deadlines and objectives are finalized. In consultation with the City’s project manager, we will co-create (trans-creation)

deadlines and responsibilities to set clear expectations and project objectives. Charis Hnin will be the designated project manager and the primary contact for interactions with the City's project manager and team. Talitha's clients have direct access to Charis' work cell phone to call or text for needs that are urgent and can't wait for project meetings. In her absence, Carol Rozumalski will serve as a deputy project manager. This minimizes any interruptions in service and deliverables.

In our proposed fixed budget, we have built-in travel and accommodation expenses. Although Talitha is based in Washington state, our team members will remain flexible to support the City in person or in hybrid as necessary. We understand that when consulting for advisory board members or elected officials, consultants work around their schedules not ours. We will establish multiple points of check-ins and communications with the City's project manager and staff to ensure the goals and needs of the organization are being met. Past and present clients have consistently commended Talitha for being thorough and responsive.

Our communication methods with clients are based on a project manager-to-project manager approach, regularly scheduled project meetings, continuous communications via email, shared drive for information sharing and document management, project management tool (Zoho projects for the internal team), and team meeting notes.

Charis and the leadership at Talitha are experienced and disciplined public speakers who have done extensive presentations to diverse constituents, stakeholders, and elected officials for a wide variety of topics, both in-person and online. In fact, she has interacted with a few DEIAC members for the PROS Plan.

We recognize Talitha Consults is an out-of-state firm. Therefore, for us to build a strong coalition with local leaders, movers and shakers is an imperative, not an option.

5. Proposer’s Approach and Methodology for Preparing the Project Cost Estimate

The proposed total budget for this work is not to exceed **\$92,500.00**.

CITY OF MCMINNVILLE: ORGANIZATIONAL ASSESSMENT: DIVERSITY, EQUITY, & INCLUSION					
Detailed Fee Schedule					
LABOR					
Name of Organization’s Team Member(s)	Description of Task	Hourly Bill Rate	Estimated Number of Total Project Hours	% of Involvement	Total
Charis M. Hnin		\$200.00	163.50	40%	\$32,700.00
Carol Rozumalski		\$178.00	69.00	15%	\$12,282.00
Eugene Marmaziuk		\$70.00	351.25	30%	\$24,587.50
Jonathan Joseph		\$148.00	27.50	5%	\$4,070.00
Luz Boys		\$148.00	27.50	5%	\$4,070.00
Beryne Odeny		\$178.00	23.00	5%	\$4,094.00
Total Labor Hours				Total Labor Cost	\$81,804

OTHER EXPENSES (e.g., communication & graphic design, travels, translation, interpretation services, etc.)	For costs that are <i>not</i> included in labor, with a description and cost for each expense.		
Description of Item(s)	Estimated expense per unit	Estimated quantity of units	Total Cost
Seattle to McMinnville OR round trip - car rental + gas	\$650.00	3	\$1,950.00
Accommodation - team member 1	\$107.00	6	\$642.00
Accommodation - team member 2	\$107.00	6	\$642.00
Per Diem - team member 1	\$59.00	6	\$354.00
Per Diem - team member 2	\$59.00	6	\$354.00
Communication & graphic design & other reimbursable costs	\$2,250.00	1	\$2,250.00
Incentives / Stipends for community-engaged practices			\$4,500
Total Other Expenses			\$10,692.00
GRAND TOTAL COST			\$92,495.50

Supportive Information

RELEVANT PROJECT SAMPLES



EXECUTIVE SUMMARY

In the first version of the Community Engagement Strategic Plan (CESP), the Community Engagement Department (CED), in partnership with Talitha Consults (Talitha), shared the key findings on the current landscape of UTA's community outreach and engagement (CO&E) practices; areas for improvement, and identified four strategic priorities for engagement over the next five years. These strategic priorities and their associated activities are informed and shaped by diverse perspectives and priorities from internal and external key stakeholders with whom the project team engaged in various points of the process—reference CESP Process Map on page 7 for details.

In the initial phase, Talitha generated a report documenting strengths, challenges, opportunities and risks (SCOR) based on a thorough review of existing policies, procedures, and practices related to public input, the agency-wide strategic plan, and programs led and co-led by CED—reference SCOR Analysis on page 10. The SCOR analysis was followed up with mixed-method engagement activities that involved extensive internal and external stakeholder and public involvement to ensure a range of perspectives inform the plan and priorities at UTA.

The internal and external stakeholders expressed the need for a **unified agency-wide community outreach and engagement philosophy coupled with strategic direction and implementation plan inclusive of impact measures**. Community members who participated in Talitha-facilitated listening sessions offered solutions and expressed interest in more opportunities to share their experiences and suggestions related to transit. Overall, UTA's efforts to improve community engagement were received positively, but most stakeholders identified potential risks associated with inauthentic engagements and capacity limitations. The most common theme is the need to build trust and accountability inside and outside of UTA.

Guided by these key findings, Talitha developed CESP guided by a framework with four pillars designed to support the agency-wide strategic priorities and success goals.

Community Engagement Strategic Plan Framework: Four Pillars

At the center of the strategic plan is a commitment to build and strengthen community engagement work at UTA. Four core pillars will guide CED's work:

1. Engagement culture, practices and postures
2. Public input, involvement and participation
3. Collaboration and partnership
4. Diverse customer experience

As part of the strategic plan, four priorities have been identified to encourage CED staff, leaders and their internal and external supporters to design solutions for the future by addressing outreach and engagement barriers. In so doing, CED strives to center the voices and visions of diverse community members in the agency's transportation planning and decision-making process.

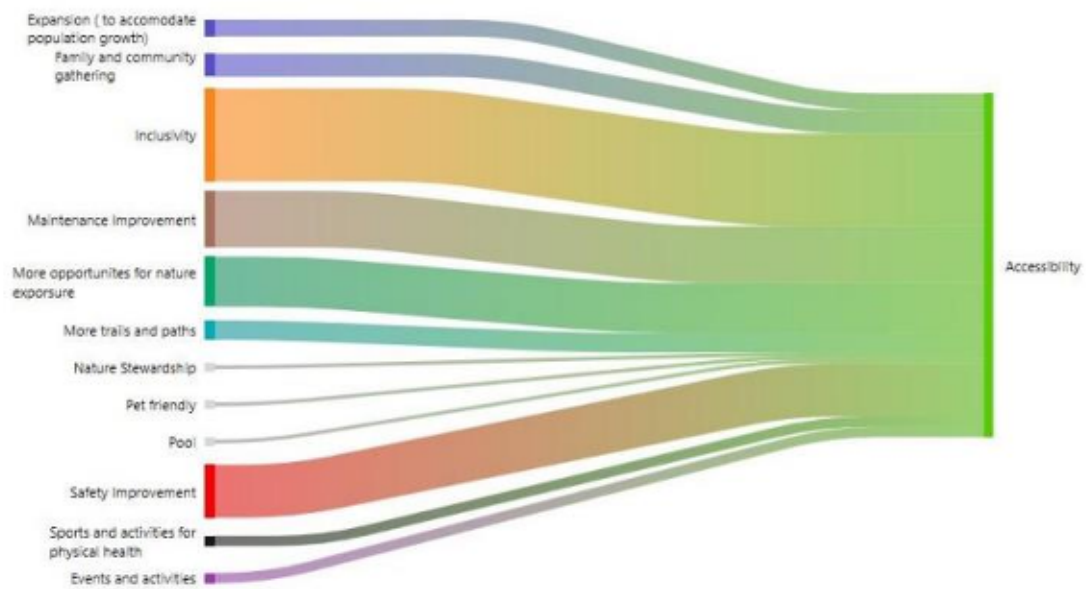
Talitha conducted an analysis to better understand what respondents meant by “accessibility” because we noticed that respondents used the terms inclusive and accessible interchangeably. Through the Sankey diagram shown below, we have discovered that when respondents mentioned accessibility or accessibly, they also meant—

Meaning 1: Being Inclusive

Meaning 2: Tied between their desires to see more investing in “Safety Improvement” and “Maintenance Improvement”

Consultants recommend the City to reflective on the following questions to avoid confusion as the City strives to advance inclusion and accessibility city-wide:

- **Is there a gap between the survey respondents’ understanding of inclusion and accessibility compared to how the City’s defines inclusion and accessibility?**
- **Does the City use these two terms interchangeable?**
- **In what ways these terms are similar? And in what ways are they different?**
- **What are the ramifications of combining inclusion and accessibility together?**



Sankey 2.2 : What survey respondents meant by accessibility

Qualitative Data Analysis Report for City of McMinnville: Parks & Recreation Open Space Plan

Diversidad, Equidad & Inclusión (DEI) Evaluación Organizacional

Informe preparado para el Distrito de Parques y Recreación de Bend

Diciembre del 2021

Charis May Hnin

TALITHA CONSULTS LLC | 14900 INTERURBAN AVE S #271 | WWW.TALITHACONSULTS.COM



**Bend Parks & Recreation District (OR) Diversity,
Equity & Inclusion (DEI) Organizational
Assessment (Spanish) (1/2)**

*English version can be accessed via BPRD's website:
https://www.bendparksandrec.org/wp-content/uploads/2022/12/DEI-Assessment-FINAL-for-publication_to-BPRD-1.19.22.pdf



Talitha Consults

Interdisciplinary • Multilingual • People-centered

Resumen Ejecutivo

“Me imagino que el Distrito de Parques y Recreación de Bend (BPRD) se convertirá en un líder de justicia en nuestra región”, dijo un miembro del personal en un grupo de enfoque centrado en la diversidad, la equidad y la inclusión (DEI) a principios del 2021. Entonces, ¿qué significa? ¿y qué necesitaría hacer BPRD para seguir el camino de la justicia social en la posición que se encuentra institucionalmente en la región? Este informe explora estas preguntas y describe los pasos iniciales que BPRD ha tomado en los últimos 15 meses para avanzar la diversidad, equidad e inclusión (DEI). Este informe también describe los puntos clave de la evaluación organizacional y encuesta a la comunidad diseñada por Talitha Consults (Talitha) en asociación con MIG (subconsultor). Termina con recomendados pasos a seguir, con un enfoque claro para ayudar al distrito a avanzar DEI con esfuerzos tanto interna como externamente.

Cada una de las fases en la evaluación de DEI está interconectada. Como tal, Talitha y el equipo del proyecto DEI del distrito implementaron una participación multifacética e iterativa que consiste de entrevistas individuales, grupos de enfoque, y encuestas al personal y a la comunidad. La figura 1 en la página 5 resume gráficamente todo el proceso.

Hallazgos clave de la evaluación organizacional:

Para esta fase, los consultores evaluaron los documentos pertinentes, entrevistaron a los grupos clave de interés y realizaron una encuesta al personal de trabajo. Con base en esta evaluación interna, encontramos que –

1. El distrito se puede beneficiar estableciendo un sistema para monitorear e informar la diversidad demográfica de los grupos de interés (internos y externos). Al hacerlo, el distrito podrá establecer una línea de base para medir el progreso de DEI a largo plazo.
2. La Equidad es un valor relativamente nuevo para el distrito. Por lo tanto, es necesario que haya una coordinación sistemática para definir y medir oportunidades y resultados equitativos internamente y externamente.
3. Actualmente, la inclusión es definida por el distrito de la siguiente manera: “individuos con o sin discapacidades que participan en actividades recreativas simultáneamente¹.” Mientras esta definición de la inclusión había proveído un mayor acceso para los usuarios con diversa neurodiversidad y limitaciones físicas, existe una gran necesidad de aumentar el acceso para otros grupos que han sido agobiados o reprimidos debido a el racismo estructural, la xenofobia, una brecha de riqueza² cada vez mayor y otras formas de injusticias sistemáticas que han impedido el florecimiento de todas las poblaciones.

Otro componente clave de la evaluación organizacional es la encuesta al personal de trabajo. Talitha recibió 165 respuestas en total para esta encuesta. Los puntos clave de aprendizaje de la encuesta al personal incluyen –

- Aproximadamente 79% del personal indicó interés en aprender sobre DEI.

Bend Parks & Recreation District (OR) Diversity, Equity & Inclusion (DEI) Organizational Assessment (Spanish) (2/2)

*English version can be accessed via BPRD’s website:
https://www.bendparksandrec.org/wp-content/uploads/2022/12/DEI-Assessment-FINAL-for-publication_to-BPRD-1.19.22.pdf

Página 2

¹ <https://www.bpr.org/>
² Findings from the

TALITHA CONSULTS FLYER



Talitha Consults

INTERDISCIPLINARY + MULTILINGUAL
+ PEOPLE-CENTERED

Talitha Consults is a team of interdisciplinary and multilingual professionals who supports organizations and communities with equity-focused community planning and leadership development workshops. We are regional planners, educators, facilitators, researchers, communicators, designers, and community builders.

Talitha is a value and impact-driven team. Every member of Talitha is committed to:

- Racial equity & social justice
- Meaningful community engagement
- Contextualized & asset-based solutions
- Entrepreneurial thinking
- Steadfast & thorough customer support
- Attentive & compassionate listening
- Deliver programs in-person and virtual

COMMUNITY PLANNING

We partner with clients to develop strategies for capacity building, mobilization, education and outreach that aim to bring greater inclusion, equity and positive transformation.

LEARNING & DEVELOPMENT

We design and deliver leadership development, racial equity and social justice workshops tailored to each client's needs.

MULTIMEDIA COMMUNICATION

We produce cutting-edge design combined with powerful storytelling using video, audio, animation, graphic design, boost social media performance and improve search engine optimization.



CO-CREATE + SUSTAIN

We equip and empower our national and international clients with tools and mechanisms necessary to plan, strategize, and operationalize comprehensive equity-centered planning relevant to their contexts and cultures. Talitha's strength is its partners and advisors who bring expert-level knowledge and experience from diverse industries.

Each team member's unique linguistic and cultural background further enriches the client experience. Collectively, we speak nine languages. Our team thinks and acts inclusively while putting equity and sustainability at the forefront of everything we do. Diversity is not what we do, it is **WHO WE ARE TOGETHER.**



We tailor interdisciplinary teams specific to our clients. Along with quantitative and qualitative research, we integrate 21st century technology and multimedia to address barriers that might limit inclusion and active participation of diverse groups of people in community planning, policymaking, and other decision-making processes.



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