



American Mortgage
Diversity Council
Where Diverse Groups Share Common Goals.

American Mortgage Diversity Council

Request for Proposal

PROJECT TITLE: Educational Training Program on Diversity and Inclusion within the Mortgage Industry

PURPOSE: This project will further the education and understanding of professionals employed within the mortgage industry on the subject of workplace diversity and inclusion.

PROPOSAL DUE: All Proposals must be delivered electronically to Veronica Guerrero, Associate Director, American Mortgage Diversity Council, Veronica.Guerrero@AMDCouncil.com by **5 p.m. CST March 21, 2017.**

DATE OF ISSUE: February 28, 2017

SECTION I: GENERAL INFORMATION

I-A PURPOSE

The American Mortgage Diversity Council (AMDC), an independent professional association focused on creating a diverse and inclusive mortgage industry for all, is seeking proposals for an educational module that 1) recognizes the opportunity to promote knowledge surrounding key diversity and inclusion subject matter in the workplace and 2) fortifies the conversation through training across the mortgage servicing industry.

I-B ISSUING OFFICE

The AMDC is the sole point of contact for this RFP. All inquiries relating to this request for proposal should be addressed to:

Veronica Guerrero
Associate Director
American Mortgage Diversity Council
Veronica.Guerrero@AMDCouncil.com
214-668-2648

1349 Empire Central Drive, Suite 900
Dallas, Texas 75247

I-C SCOPE OF WORK

Respondents should provide an outline detailing curriculum that educates individuals on inclusion practices/policies and tests awareness of the subject matter explored.

1. The selected organization will be responsible for developing interactive training modules and educational materials.
2. The organization will also produce review modules that reinforce learning and assess participant proficiency in each subject.
3. The module must be web-based. It must be hosted, maintained, and supported by the selected organization at its own cost.

I-D CONSIDERATION

No monetary compensation will be paid for the development and maintenance of the module. In consideration for the services set forth in the Section I-C Scope of Work, the selected organization will secure brand positioning in the module. Specifically, each slide of the module will feature the phrase “Powered by” adjacent to the selected organization’s logo in the bottom

footer. The AMDC logo will appear in the header of each slide. Logos will be positioned in a way so as not to be intrusive upon the learning experience.

I-E ELIGIBLE APPLICANTS

Any organization capable of delivering the services outlined in Section I-C Scope of Work may submit a proposal for consideration. Preference will be given to providers engaged in the business of providing technology-related services to the mortgage servicing industry.

If you plan to submit a proposal, please contact Veronica Guerrero at Veronica.Guerrero@AMDCouncil.com prior to the proposal deadline of March 21, 2017.

I-F RESPONSE DATE

To be considered, proposals must arrive to AMDC as specified on the cover page of the RFP. Bidders mailing proposals should allow mail delivery time sufficient enough to ensure timely receipt of their proposals. Proposals that are received after the specified due date and time, regardless of the date of postmark receipt, cannot be considered and will be returned promptly to the bidder. Bidders are solely responsible for the timely arrival of proposals at AMDC. Late proposals and proposals submitted electronically or by facsimile will be returned to the applicant *without review*.

I-G REJECTION OF PROPOSALS

The AMDC reserves the right to reject any and all proposals in whole or in part or to negotiate separately with any sources whatsoever to serve the best interests of the organization. Additionally, past performance on other projects will be considered.

I-H PERFORMANCE REPORTING

As a condition of performance, the selected organization will provide AMDC with reports describing the project's progress on the approved work plan. Reports may be required by AMDC at any time. AMDC reserves the right to suspend or terminate the Project if there is a lack of progress.

I-I ACKNOWLEDGEMENT

All hard copy and electronic publications including news releases, reports, films, brochures, CD-ROMs, videos, DVDs, or any project materials developed in connection with this RFP must be approved by AMDC before dissemination. All products and materials must include the following statement:

The opinions expressed herein do not necessarily reflect the position or policy of the American Mortgage Diversity Council or any of its individual members and no endorsement is inferred. For further information or inquiries about this project and other initiatives, contact the American Mortgage Diversity Council, 1349 Empire Central Drive, Suite 900, Dallas, Texas 75247

I-J APPLICANT MEETING

There will be an opportunity for prospective applicants to meet with representatives from AMDC for a question-and-answer session.

Applicant Meeting details:

Date: March 7

Time: 2 p.m. CST

Location: Teleconference information will be provided.

Participation in the Applicant Meeting is not mandatory. Representation is limited to two (2) representatives per organization. The purpose of this meeting is to give potential vendors the opportunity to ask AMDC representatives questions about the RFP. If you will be sending representatives to this meeting, please provide names and titles of those attending by March 1, 2017, to Veronica.Guerrero@AMDCouncil.com.

I-K ADDENDUM

In the event it becomes necessary for AMDC to revise any objective, an addendum will be posted on the AMDC website and provided in writing to all potential bidders who have notified AMDC of their intent to submit a proposal.

I-L ORAL PRESENTATION

Bidders who submit a proposal may be required to make an oral presentation of their proposals to AMDC. These presentations provide an opportunity for bidders to clarify the proposal to ensure thorough mutual understanding. The AMDC will schedule these presentations if required.

I-M PROPOSAL PREPARATION, FONT SIZE, AND PACKAGING

The proposal should be prepared simply and economically, double-spaced, with one-inch margins and with a font no smaller than Verdana 11 point. Tables must be developed with a font no smaller than Verdana 11 point, but text may be single-spaced. Proposal narratives must be no

longer than 15 pages in length. Applications submitted but not in accordance with application preparation instructions *will be returned without review*.

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SECTION II: Work Statement

II-A UNDERSTANDING OF NEED

AMDC is seeking a selected organization to develop training modules for diversity and inclusion within the mortgage industry.

II-B OBJECTIVES

The selected organization will primarily be responsible for developing a training module for mortgage industry professionals to become better educated on diversity and inclusion issues within the workplace. The following objectives are specific to the implementation of this project:

1. All instructional modules must be clear and explicit regarding the scope and sequence of skills and expected outcomes.
2. The content of the module must include educational materials focused on the following subjects:
 - a. The history of the mortgage industry's movement toward more robust diversity and inclusion practices.
 - b. Creating an inclusive environment.
 - c. The basic tenants and consequences of Executive Order 13583, signed by President Barack Obama on August 23, 2011.
 - d. Relevant workplace protections for suspect classifications of individuals (e.g. ethnic minorities, women, LGBT individuals, etc.)
 - e. Statistics concerning the share of individuals belonging to one or more suspect classification in the mortgage industry.
 - f. Compliance with all state and federal regulations connected to diverse hiring practices and the basics of implementation for successful diverse hiring initiatives.
 - g. Relevant workplace protections for individuals with disabilities.
 - h. Implementation of Section 342 of the Dodd–Frank Wall Street Reform and Consumer Protection Act.
 - i. Relevant aspects of supply-chain diversity practices.
 - j. The connection between diversity/inclusion and innovation.
 - k. Workplace conflict resolution.
 - l. Emerging issues in diversity and inclusion.

II-C REVIEW PROCESS

All proposals will be reviewed using a structured review system. Award selections will be based on merit as determined by points awarded in accordance with the Review Panel Score Sheet and all relevant information provided in the proposal.

The maximum score for the following criteria is 140 points.

Work Plan: 90 Points

Prior Experience: 30 Points

Qualifications of Key Personnel: 20 Points

Applicants should refer to Appendix B for the score sheet.

SECTION III: INFORMATION REQUIRED FROM SUBMITTING ORGANIZATION

The applicant's proposal is to be submitted in the format outlined below.

III-A COVER

The cover page of the proposal must include: (1) the title of the Project; (2) the organization name and address; (3) the phrase "Point of Contact," followed by the typed name, title, phone number, and email address of the person authorized to speak for the organization on all matters concerning the project; and (4) the phrase "Submitted with the assurance that this proposal will remain valid for at least 60 days from the due date, by:" followed by the signature, typed name and title, and date of signature of the person authorized to execute legally binding project agreements for the organization.

III-B BUSINESS ORGANIZATION

State the full name and address of the organization and, if applicable, the branch office or other subordinate element that will perform or assist in performing the work proposed. Indicate whether the organization operates as an individual, partnership, or corporation. If it is operated as a corporation, include the state in which it is incorporated.

III-C UNDERSTANDING OF NEED

State in succinct terms an understanding of the problem(s) as presented by this RFP. Evidence of sufficient understanding should extend beyond a mere restatement or paraphrase of the "Understanding of Need" statement from the RFP. Support this understanding with examples of existing capacity if possible.

III-D WORK PLAN

Include a narrative summary description of the proposed training program modules that will be delivered. Make specific reference to the objectives in the RFP.

III-E OUTLINE

A proposed outline of the module that details each of the objectives outlined in Section II-B must accompany the work plan.

III-F PRIOR EXPERIENCE

The organization must show the ability to perform the objectives of this project. Proposals must include documentation of the following:

1. Past experience in developing clear and explicit training programs/modules for educational purposes.
2. Knowledge of and/or experience with diversity and inclusion issues in the mortgage industry, including best practices and relevant governmental regulation.
3. Experience in creating web-based, criterion-referenced assessments that include multiple ways of showing learning (i.e.; multiple choice questions, short answer questions, and scenario descriptions that require the application of learning.)

III-G ORGANIZATION CAPACITY AND HUMAN RESOURCES

The successful applicant must provide a statement demonstrating its capability to support the project with personnel who possess talent in training module development, assessment, and utilizing data.

III-H ADDITIONAL INFORMATION AND COMMENTS

Include any other information that is pertinent but not specifically asked for elsewhere.

III-I APPENDICES

Include Assurance of Project Conditions to indicate agreement with Project conditions as specified. Do not include lengthy general lists of publications or other documents unless their inclusion is essential to reviewer's understanding of your proposal and you made explicit reference to them in the body of the proposal.

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SECTION IV: CONDITIONS OF APPLICANT

If awarded this Project, I understand and agree to the following:

IV-A INCURRING COSTS

AMDC is not liable for any cost incurred by any applicant prior to the execution of a Project Agreement.

IV-B SELECTED ORGANIZATION RESPONSIBILITIES

The selected organization will be required to assume responsibility for all activities offered in this proposal whether or not he/she performs them. Further, AMDC will consider the selected organization to be the sole point of contact with regard to any matters resulting from the anticipated Project Agreement.

IV-C RELEASE OF INFORMATION/CONFIDENTIALITY

Organization-initiated publications or news releases pertaining to the Project Agreement, work performed under the Project Agreement, products of the work, or materials based upon the products shall occur only with written prior approval of AMDC.

IV-D OWNERSHIP

Ownership of intellectual property resulting from this project shall remain with AMDC, which reserves the right to copyright, patent, or otherwise protect their integrity or availability for public use.

IV-E INDEMNIFICATION

The selected organization, as a condition of selection, shall indemnify and hold harmless AMDC and its agents and employees from and against all claims, damages, losses, and expenses, including attorney fees arising out of or resulting from the performance of the work, which includes all labor, materials, and equipment required to produce the commodity, construction and/or service required by the Project Agreement, provided that any such claim, damage, loss, or expense:

- a) is attributable to bodily injury, sickness, disease, or death, or injury to or destruction of tangible property (other than the work itself), including the loss of use resulting there from, and
- b) is caused in whole or in part by any negligent act or omission of the Selected organization or anyone directly or indirectly employed by any of them or any of whose acts any of

them may be liable, regardless of whether or not it is caused in part by a party indemnified hereunder.

IV-F SELECTED ORGANIZATION'S LIABILITY INSURANCE

The selected organization, as a condition of the Project Agreement that may ensue from the RFP, shall purchase and maintain such insurance as will protect the selected organization from claims set forth below which may arise out of or result from the selected organization's operations under the Project Agreement, whether such operations be by the selected organization or by any sub-selected organization or by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

IV-G NON-DISCRIMINATION AND OTHER COMPLIANCE WITH LAW

Each proposal must include an assurance statement of compliance with all Federal laws and regulations prohibiting discrimination. The assurance must state that it is the policy of the bidder's organization that no person on the basis of race, color, religion, national origin or ancestry, age, sex, marital status, or disability shall be discriminated against, excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination in any program or activity for which the bidder is responsible.

IV-H EQUITABLE ACCESS

All mandated activities, project development, and implementation activities must promote equitable access to support meaningful implementation of the project and to ensure continuity and adherence to stated AMDC goals and objectives.

IV-I ACCEPTANCE OF PROPOSAL CONTENT

The contents of the proposal of the successful organization may become contractual obligations if a Project Agreement ensues. Failure of the successful bidder to accept these obligations may result in cancellation of the selection.

IV-J ASSURANCE OF PROJECT CONDITIONS

The submission of a proposal, signed by an official authorized to bind the organization submitting the proposal contractually, shall constitute assurance that the proposing organization has accepted, unconditionally and without reservation, all conditions, requirements, and specifications of the RFP. In addition, such submission shall constitute assurance that the submitting organization understands that all or any part of the RFP may be included by reference in any Project Agreement based on the RFP. See Appendix A.

Appendix A

Applicant Organization (Name and Address)

Project Director (Name, Title, Address, Phone)

Project Title and Summary

Authorizing Official Signature

I, the undersigned, having become thoroughly familiar with an understanding of all the proposed documents attached hereto, agree to provide the services as specified herein. I hereby state that all of the information I have provided is true, accurate, and complete. I hereby state that I have authority to submit this proposal, which will become a binding Agreement if accepted by AMDC. I hereby state that I have not communicated with, nor accepted anything of value from an employee of AMDC that would tend to destroy or hinder free competition. I hereby state that I have read, understand, and agree to be bound by all the terms of this document.

Signature of Authorized Official

Title

Date

Appendix A

Project Title: Educational Training Program on Diversity and Inclusion within the Mortgage Industry

Following is a rubric to help proposal writers ensure they have sufficiently addressed all required elements and to help reviewers score the Proposals. It is strongly suggested the narrative be written in the sequence of the rubric.

A. Work Plan

Provide a clear description of the instructional coach training modules that will be developed. Provide the following:

1. An overview of the development of the training modules. **(10 Points)**
2. Detail the content of each module. **(60 Points)**
3. A description of the web-based assessment; detail the content and how it will be developed. **(20 Points)**

This section is worth a maximum of **90 points**.

B. Prior Experience

Provide a description of the methodology, design, and strategies to be used to accomplish the project goals. Address the following elements:

1. Past experience in developing clear and explicit training programs/modules. **(10 Points)**
2. Knowledge of and/or experience working with state and federal regulations relating to diversity and inclusion. **(10 Points)**
3. Experience in creating web-based, criterion-referenced assessments that include multiple ways of showing learning (i.e.; multiple choice questions, short answer questions, and scenario descriptions that require the application of learning.) **(10 Points)**

This section of the proposal is worth a maximum of **30 points**.

C. Organizational Capabilities

Provide a description of the capacity of the organization to complete this project and a proposal for key personnel who will oversee its implementation. A review of each application will be made to determine whether the qualifications are appropriate.

This section of the proposal is worth a maximum of **20 points**.

Individual Score Sheet

A. Work Plan - 90 Points Maximum

1. An overview is present and adequately describes the training module development.

Scoring (Circle One)

Marginally Comprehensive, Lacks Rigor	0 Points
Comprehensive, Rigorous	5 Points
Exceptionally Comprehensive and Rigorous	10 Points

2. A description of the modules' content and use of a recognized coaching model is present.

Marginally Comprehensive, Lacks Rigor	0 Points
Comprehensive, Rigorous	5 Points
Exceptionally Comprehensive and Rigorous	10 Points

3. A description of the web-based assessment and details of the content and how it will be developed is present.

Marginally Comprehensive, Lacks Rigor	0 Points
Comprehensive, Rigorous	10 Points
Exceptionally Comprehensive and Rigorous	20 Points

Section Total: _____

Comments:

B. Prior Experience - 30 Points Maximum

1. Past experience in developing clear and explicit training programs/modules. **(10 Points)**

Marginally Comprehensive, Lacks Rigor	0 Points
Comprehensive, Rigorous	5 Points
Exceptionally Comprehensive and Rigorous	10 Points

2. Knowledge of and/or experience working with state and federal regulations relating to diversity and inclusion. **(10 Points)**

Marginally Comprehensive, Lacks Rigor	0 Points
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Comprehensive, Rigorous 5 Points
Exceptionally Comprehensive and Rigorous 10 Points

3. Experience in creating web-based, criterion referenced assessments that include multiple ways of showing learning (i.e.; multiple choice questions, short answer questions, and scenario descriptions that require the application of learning.) **(10 Points)**

Marginally Comprehensive, Lacks Rigor 0 Points
Comprehensive, Rigorous 5 Points
Exceptionally Comprehensive and Rigorous 10 Points

Section Total: _____

Comments:

C. Organizational Capabilities (20 Points Maximum)

1. The proposal provides evidence that demonstrates sufficient organizational infrastructure to support the project. **(10 Points)**

Marginally Comprehensive, Lacks Rigor 0 Points
Comprehensive, Rigorous 5 Points
Exceptionally Comprehensive and Rigorous 10 Points

2. The proposal provides evidence that the key personnel are qualified to carry out the project objectives. **(10 Points)**

Marginally Comprehensive, Lacks Rigor 0 Points
Comprehensive, Rigorous 5 Points
Exceptionally Comprehensive and Rigorous 10 Points

Section Total: _____

Comments:

Total Score: _____