

# Equitable Procurement Processes with Priority Populations\*



*Regional Health Equity Coalition Program  
OHA Equity and Inclusion Division*

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Regional Health Equity Coalition (RHEC) at [rhecprogram@oha.oregon.gov](mailto:rhecprogram@oha.oregon.gov) or 503-979-6983 (voice/text). We accept all relay calls.

**Below are some best practices to consider for procurement processes. However, it must be noted that none of these steps can take place ahead of building genuine relationships and trust with community partners. This takes time and is the necessary work that must happen ahead of partnering on procurement.**

## Development of scope of work

The scope of work should be co-created with community partners. The following questions should be discussed with partners:

- Are the goals a community priority? Is the funder aligning with partner needs and available resources?
- Are the deliverables and timelines reasonable and feasible?
- Does the funding amount match the effort?
- Are expectations clear and in plain language?

## Creation of criteria for competitive solicitation

- Include community leaders in developing solicitation criteria and compensate them for their expertise, time and effort. This signals appreciation and value for their labor and partnership.
- Do not ask communities to relive trauma to be awarded resources. They should not be expected to showcase trauma and harm to participate. Consider the impact on entities participating in this process and minimize any potential harm.

---

\* Priority populations include: Communities of color; Tribal communities including the nine federally recognized tribes of Oregon and other American Indians and Alaska Natives people; Immigrants; Refugees; Migrant and seasonal farmworkers; Low-income individuals and families; Persons with disabilities; and Individuals who identify as lesbian, gay, bisexual, transgender, or queer, or who question their sexual or gender identity. (ORS 413.042, OAR 943-021-0005)

- Consider historic and current day exclusion and lack of opportunities for building capacity around these processes and lack of access to infrastructure to support it. Actively work to address these barriers to make the proposal process as accessible as possible. This will look different for various communities.
- Be flexible and allow fiscal sponsorships and sub-grant agreements to offset the lack of existing infrastructure. Recommend developing a memorandum of understanding (MOU) between the group and the fiscal sponsor to clearly articulate each group's responsibilities and expectations.
- If possible and/or necessary, offer technical assistance for proposal development.
- Make proposals as easy and minimal to complete as possible. Discuss and confirm what is “easy” and “minimal” for the partner.
- Do a plain language review of the proposal and test the reading level of the document.
- Consider language access and have the proposal translated to reach communities who speak languages other than English. Be prepared to have workforce available to support partners in their language as well.
- Conduct an ADA accessibility assessment of proposals.

## **Budget considerations**

- If there is a fiscal agent involved, allow a percentage of the resources to be provided for infrastructure and administrative support.
- If working with sovereign nations, allow them to determine their indirect rate rather than the funder selecting a cap. This is an important equity consideration since some sovereign nations do not have the benefit of tax structures and the resulting infrastructure and resources that come with it.
- Allow resources to be used for infrastructure and capacity building. Such as hiring staff, securing necessary software, equipment, etc.

## **Outreach for solicitation announcement**

- Ensure broad reach, especially to communities and regions that are typically less engaged and resourced.
- Consider especially culturally specific CBOs and outreach to more rural and frontier parts of the state.
- Offer webinar opportunities for questions ahead of solicitation. Consider accessibility to webinar and make sure it is recorded.
- Clearly share the process and expectations around solicitation (i.e. point of contact, timeline, etc.)

## Selection process includes community partners/leaders

- Panel of community partners for scoring proposals and selection
- As often as possible, delegate resources to local contractors and vendors, and invest in priority populations
- Recognize and address personal and/or group biases.

## When finalizing the agreement, communicate the process

- Share timelines and the steps of the process. Follow up throughout the process.
- If something is delayed, inform grantees as soon as possible.
- Highlight opportunities for negotiation of the grant agreement in this process.
- Offer to walk through the grant agreement so they understand what is in it, where to find information, and have an opportunity to clarify any questions or indicate any supports needed.

## Feedback on the procurement process

- After the partner has been awarded, ask for feedback on the process. What went well and what can be improved next time?
- Waiting until after the agreement is in place or the solicitation has closed to request input can help minimize fear about providing honest feedback. Providing anonymous surveys could be a helpful tool.
- Request feedback from those not awarded to learn about any additional barriers that were not previously considered.

## Supporting Grantees

- Offer support related to operations (i.e. finance, administrative needs, deliverable tracking, etc.), not programmatic guidance unless requested. Partners know best what their communities needs and are typically experts in this area.
- Be flexible. Often partners are managing crisis within their communities that is unexpected but cannot be ignored. This is another opportunity for the funder to build relationship by offering flexibility and support. Unless there is a reason preventing flexibility, it should be offered to support partners' success.
- Draft invoices for grantees so they have fewer time-consuming tasks to complete and can instead focus on the work they are being funded to do.

## Reporting requirements

- Trust that communities are doing the work. Unnecessary reporting requirements creates significant workload burden and distracts partners from doing the work that they are being resourced to do. It also signals that proof is needed to show that they are doing the work. Trust must be given to be earned.
- If there are reporting requirements that cannot be removed or minimized, work to see if there are ways to shift reporting burden from the partner to the funder. The funder has far more ability to absorb this labor.
- Consider verbal or other formats for reporting and take notes to shift reporting workload.
- Be willing to shift what the definition of success is. The funder's idea of success may be different than the partners. Equitable processes meet partners where they are, and success will look different based on community's access to resources and privilege.
- If multiple funding streams are being offered by the funder, work with colleagues to ensure reporting is coordinated and streamlined.
- Ensure dates are as flexible as possible. Recognize that concepts of time vary across cultures.
- Be sure the spend down date is reasonable in relation to when the grantee receives funds.

## Commit to quality improvement

- Continually question your process, accessibility, and other factors and be willing to change as needed.
- Assess policies and procedures that have created barriers in the procurement process.
- Identify next steps for changing policies and procedures to alleviate future challenges to more equitable and inclusive procurement.
- Acknowledge power dynamics at play in the relationship between the funder and partners. Actively work to mitigate this throughout the procurement process.
- Be open to honest feedback and do not take it personally. Be gracious to the partner for being willing to provide this information so the funder can continue to work toward improvement.
- Follow back up with partners to let them know what actions the funder took in response to the feedback. If there are things that cannot be changed, share why.
- Be transparent and share information with the partner. Throughout the process, this will support relationship and trust building.
- Assess the level of accessibility of the platform where solicitations are posted. Work to address improvements that are needed.
- Be a connection maker. Connect grantees to other resources that will be useful in their work.



You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Regional Health Equity Coalition (RHEC) at [rhecprogram@oha.oregon.gov](mailto:rhecprogram@oha.oregon.gov) or 503-979-6983 (voice/text). We accept all relay calls.

200-304900 (08/2023)