



**Request for Proposals:
Organizational Development, Strategy
and Management Consultant**

Overview:

The Public Health Institute (PHI) – an independent, nonprofit organization dedicated to advancing well-being and health equity with communities around the world – is seeking to retain the services of an experienced organizational development consultant. The consultant will work with PHI's senior leadership team to adapt to a rapidly changing environment and organizational growth through both strengthening the leadership and management teams and organizational structure to achieve our highest potential impact as an organization. The objective of the work is to 1) support improved communications and build more effective team collaboration in a rapidly changing environment; and 2) identify and support the implementation of strategies that promote the effective execution of PHI's 2021-2024 Strategic Framework.

Background:

Over the past two years, PHI has undergone significant change and growth, doubling in size, both in terms of revenue and staff, and expanding our portfolio of programs, most notably in response to the COVID-19 pandemic. At the same time, PHI's senior leadership and management teams have undergone significant transition, with new executive staff and management across areas of critical business function. These significant shifts have taken place at a time when the organization's central administrative office has moved to almost fully remote operations. Staffing has also shifted from a primarily Oakland, California based team (with some staff in Sacramento) to the reality today where our central administrative staff are located in over 30 U.S. states

As with any significant organizational transitions, these changes have presented challenges and opportunities. PHI is committed to identifying strategies, tools and approaches that can enhance and promote internal collaboration and communication among our executive leadership team to create a maximally effective team that brings commitment to achieving our mission and creating a culture of joy in our work.

This will be a two-phase project: (1) organization review and leadership and business alignment, (2) implementation plan and support.

PHI may issue an Indefinite Quantity Contract (IQC) to the successful proposer from this procurement process. PHI will, at its sole discretion, negotiate, award, or not award an IQC to any qualified respondent PHI deems qualified, responsible, and capable of providing the resources and services as outlined in the Project Description.

Proposal Format:

For PHI to conduct the most efficient proposal evaluation, interested bidders are required to include the following information in their submission:

1. **Cover Letter and Contact Information** – A cover letter supporting interest in this RFP Scope of Work, including identifying the primary contact for Respondent.
2. **Corporate Overview** – A description of the respondent, corporate entity type (LLC, S Corp., non-profit, etc.) and proposed skill set of individual(s) for the scope of work. Please include the capabilities and past related performance of the respondent (maximum of 2 pages).
3. **Proposal/Proposed Approach** – A description of the respondent's proposal and/or approach to the services outlined in the Project Description section (maximum of 3 pages).
4. **Rates Schedule** – The respondent's fixed burdened hourly rates by person/role proposed using the format provided in Attachment A.
5. **References** – A list of three to five references (including name, title, email, phone) to validate past performance.

Submission of Proposals & Closing Time:

Please submit proposals to: Lisa Stauber, Executive Assistant to CEO
Email: lstauber@phi.org

Proposals are due by: **Friday, January 14, 2022**
5:00 pm – Pacific Standard Time

Solicitation Guidelines:

1. **Confidentiality** - All non-public information concerning this RFP, including any related information that is subsequently disclosed by Respondent during the proposal process, is Respondent's confidential information. PHI will not disclose any non-public information or use it for any purpose other than responding to the RFP without Respondent's prior written consent, except as required by law. Submission of a proposal constitutes acceptance of these terms.
2. **Discretion and Not Binding** - This RFP is a solicitation for proposals only and neither the issuance of this RFP nor the submission of a responsive proposal shall be binding on PHI. PHI reserves the right to accept or reject any or all proposals, or to cancel this RFP for any reason or no reason at any time. No binding agreement shall exist with respect to the provision of services for the Project Description, unless and until a definitive agreement has been fully executed in writing by both PHI and the selected

Respondent. PHI shall not be liable under any circumstances for any expenses incurred by any Respondent in connection with the RFP, proposal submission or selection process.

3. **Task Orders** - PHI envisions that task orders will be issued as time and expense agreements where the contractor is paid at approved rates for time expended and expenses reimbursed according to actual costs incurred. The IQC will outline fixed rates and prices for task orders that may be issued under the IQC, which may be subject to change based upon mutual agreement of both parties to the IQC.
4. **Fixed Burdened Hourly Rates** - for the purposes of evaluation and rate setting, the respondent is required to submit their fixed burdened hourly rate by position and by person using the format shown in *Exhibit A (Respondent's Rate Sheet)* part of their proposal. If selected, these fixed rates will be incorporated into the respondent's IQC award as the basis for cost calculations for task orders.
5. **Pricing** - prices must be inclusive of all costs, including taxes and fees, in U.S. dollars. Rates should remain valid for 180 days from submission.
6. **Proposal Costs** - there is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.
7. **Right to Waive Re-Proposal** - PHI reserves the right to waive irregularities and technicalities and request re-proposals.
8. **Respondent Responsibility** - the respondent shall be responsible for reading very carefully, and understanding completely, the requirements and the scope of work of the items contained in this RFP. RFP timeline will be and must be scrupulously observed.
9. **Conflict of Interest** - all respondents must disclose with their RFP the name of any officer, director or agent who is also an employee of PHI. Further, all respondents must disclose the name of any PHI employee who owns, directly or indirectly, an interest of more than five percent (5%) in the respondent's firm, subsidiaries, branches, or parent company.
10. **Federal and State Tax** - PHI is exempt from federal tax, state sales and service tax and state tax for tangible personal property. Respondents doing business with PHI shall not be exempted from paying sales tax to their suppliers for materials to fulfill contractual obligations with PHI, nor shall any respondent/contractor be authorized to use the PHI's tax exemption number in securing such materials.
11. **Contingency Fees** - the respondent warrants that no person or selling agency has been employed or retained to solicit or secure a contract herewith for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees or bona fide established commercial or selling agencies maintained by the proposer for the purpose of securing business. For breach of violation of this warrant, the board shall have the right to annul any resolving contract without liability or, in its decision, to deduct from the contract price without consideration or otherwise recover the full amount of such commissions,

percentage, brokerage or contingent fee.

12. **Period of Performance** - initial period of up to 12 months with options to renew. Scope will be issued with specific timelines for assigned tasks/projects.
13. **Compliant Proposals** - Respondents are advised to study all instructions, requirements, and other information in this RFP carefully. Respondents must:
 - Comply with all requirements set out in this RFP.
 - Respond to each element in the order as set out in this RFP.
 - Include all supporting documentation as specified in this RFP.
 - Submit proposals as specified in this RFP.
14. **Proposal Evaluation** - PHI will select the respondent(s) whose offer will provide the most favorable mix of corporate credentials and cost, thereby ensuring overall best value procurement. The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI. A respondent can receive a maximum of 100 points; scoring under 70 will not be considered responsive.
 - Company Information/Past Experience (20).
 - Resources/Services Available (35).
 - Diversity (10).
 - Fees/Financial Capacity (25).
 - Credentials and References (10).

Project Description:

PHI seeks proposals to provide strategy and business reorganization consulting services through a full range of business consulting services to ensure PHI is best prepared to best achieve its business objectives. This will be a two-phase project: (1) Organization Review and Business Alignment, (2) Implementation.

Phase 1: Organization Review & Business Alignment (through June 30, 2022)

The objective of Phase 1 is to understand PHI's business model, current trendlines, and aspirations to develop a plan that supports PHI in achieving its business objectives. Success in business alignment will also involve having strong leadership that is able to communicate and make effective decisions in support of the business aspirations.

This Phase will include but is not limited to:

- Starting with the Senior Leadership team, assess the communication and decision-making style in the context of the growing business needs. Work with the team to define areas for improvement within and across teams.
- Reviewing PHI's current business model and strategic framework.
- Developing or reviewing trendlines for PHI business over the past 36 months.
- Understanding PHI's aspirations as an organization in order to PHI achieve those objectives.

- Optimizing organizational design and internal processes and systems.
- Maximizing fiscal and human capital assets and understanding where there are gaps
 - Assessment of the structure and individuals in executive leadership and management roles in order to understand strengths, gaps, and opportunities to improve structure and process.
- Assessment of individuals in the context of their teams to identify whether people are in the right roles and where there are gaps. Building effective teams and improving the way SMT and Directors work together to support the organizational objectives and aspirations.
- Leadership effectiveness and modeling the behavior for the culture of the organization.
- Assessment of the effectiveness of SMT internally and externally (Management Team, Central, and Programs).
- Goal is to be a highly functioning team that supports the organization.
- Developing an implementation plan - It is expected that several new positions may be added to the current complement to round out current capabilities. This should be part of the implementation plan. Sub-organizational options may be considered.

Phase 2: July 2022 and beyond (Implementation)

Based on the results of Phase 1, PHI may engage the selected respondent to advise the organization during Implementation.

Location(s): Primarily remote with the possibility of two in-person sessions in Oakland or Sacramento, CA depending on COVID-19.

Diversity and Inclusion Initiative

PHI is dedicated to promoting diversity in its procurement of goods and services. Pursuant to PHI's commitment to diversity, PHI encourages vendors that are certified as any of the following businesses:

- WOSB: Women-Owned Small Business.
- SDVO: Service-Disabled Veteran-Owned Business.
- HUBZone: Historically Underutilized Business Zone.
- SDB: Small Disadvantaged Business.
- 8(a)BD: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American.

EXHIBIT A: RESPONDENT'S RATE SHEET

| No. | Position/Title | Name | Hourly Rate Rate* |
|------------|-----------------------|-------------|----------------------------------|
| | | | \$0.00 |
| | | | \$0.00 |
| | | | \$0.00 |
| | | | \$0.00 |
| | | | \$0.00 |
| | | | \$0.00 |
| | | | \$0.00 |

**This should be a fixed burdened hourly rate.*