

## Public Health Institute

### Organizational and Team Development Consulting

July 25, 2024

**Background:** In 2024 the Public Health Institute (PHI) is celebrating its 60<sup>th</sup> anniversary and the organization welcomed a new President & CEO, [Melissa Stafford Jones](#), in January. As PHI embarks on its next chapter, including development of a new five-year vision and strategic plan, it is committed to building and strengthening the organization's internal culture, practices, structures, management, and teams to ensure we have the capabilities and capacities to advance our mission of improving health equity and wellbeing for individuals and communities in California, nationally, and globally. Following several years of significant growth at PHI, the challenges and intensive period of the COVID pandemic and its aftermath for the overall field of public health, the organization is recalibrating the optimal structure, policies and systems that support our employees and advance our mission.

PHI leadership is invested in strengthening the organization through thoughtful, intentional, effective organizational development and change management. PHI understands this work is critical for positioning the organization to launch, execute and fully realize our potential through this period of transition and to optimize opportunities of a new five-year vision and strategic plan. This work would focus on the organization's central operations, including the executive team, senior leaders, and staff across 16 departments. PHI has approximately 900 employees; 15% of our staff work in Central departments and in deep partnership with PHI programs. More information about PHI can be found on our [website](#).

**Process and Timeline:** PHI is seeking to procure an experienced organizational and team development consultant to support the scope of work below through the following process and timeline.

- July 25, 2024: Proposal posted.
- August 15, 2024, COB pacific time: Proposals Due.
- August 19-22, 2024: Virtual interviews with selected vendors.
- By August 23, 2024: Final decision on award.
- September 12, 2024 (estimated): Contract in place and kick-off of work.

Additional information about proposal requirements is at the end of this document.

#### **Scope of Work:**

1. **Culture:** Support the organization in building a refreshed culture and aligned practices that advance organizational values, trust, collaborative team-based approaches, a dynamic learning and improvement environment, and mission-impact focus, where people feel cared for and connected to the organization's purpose and know that their works make a difference.
2. **Organizational Development:** Focus on: effective organizational decision-making; organizing our structure, teams and staff to fully capture the expertise and capabilities of our people; increase our capacity for healthy conflict and debate; activate the capacity of senior leaders and middle management; increase iterative participatory practices that appropriately engage staff at multiple levels; increase and

embed the combination of learning, improvement and accountability; support development of a dynamic organization that addresses challenges and problems with a growth mindset.

3. **Change Management:** Support leadership in managing the organization through a period of significant transition with a new CEO, working through changes and challenges arising from changes in the external context, shifting funding landscape and opportunities, a new strategic plan, and significant culture change and organizational development to optimally position PHI for the future.
4. **Executive Leadership Development:** Conduct intensive team development with the executive team to increase our capacity to function as a highly effective team focused on advancing the organization's strategy and mission, grounded in trust, productive use of expertise and ideas from a range of perspectives, clarity of action and agreements, and focus and shared accountability for results. May also include coaching for individual executives and senior leaders/middle managers.

The project is expected to be conducted September 2024-December 2025 with a budget in the range of \$200,000-\$250,000.

**Proposal Requirements:** Proposals should include the components below, not to exceed 10 pages total. Proposals are **due Thursday, August 15, 2024, at 5 pm pacific time** and should be sent to Jennifer Lucas, Executive Assistant to Melissa Stafford Jones, President & CEO, at [jlucas@phi.org](mailto:jlucas@phi.org).

- Summary of your philosophy and expertise in culture and organizational development, team development and change management.
- Explanation of your approach to organizational development work with nonprofit organizations, and specifically nonprofit organizations committed to centering equity.
- Planned approach to the proposed scope of work with PHI, including:
  - High level approach you would propose for each of the four components
  - High level work plan for each of the four components and key ways in which those activities may intersect and build on each other. Please make clear how the proposed work addresses the key sub-elements of culture, organizational development and executive team development identified in the scope of work
  - Timeline and sequencing of key elements and activities of the proposed work plan
  - How your approach would support PHI in advancing equity in its organizational practices
  - How your approach would be attuned to this period of transition and preparing the organization for its next chapter
  - Other elements to your planned approach you'd like to include or highlight
- High level budget, including budget for each of the core components of work in your proposed approach. Please include hourly rates and other material costs factored into the proposed budget.
- Summary of your experience and expertise; if you will be including other members of your organization or partners in the work, please provide a brief explanation of roles and bio(s) of those people.
- Include brief information/summary about three engagements with other nonprofit organizations that include work across the areas of organizational development, executive team development, and change management.