Request for Proposals: Communications and Team Development Consultant Organizational Structure & Business Alignment 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 experienced consultants to enhance communications and align an optimal organizational structure with our evolving business model. The consultant(s) will work with PHI’s senior leadership team to adapt to a rapidly changing environment and organizational growth by 1) strengthening the effectiveness and communications of the leadership and management teams and 2) identifying an organizational structure to achieve our greatest impact and elevate the goals of the 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 all critical business functions. These significant shifts have taken place at a time when the organization’s central administrative office has moved from being primarily based in the Oakland and Sacramento offices to remote operations with staff now located across the United States.

As with any significant organizational transitions, these changes have presented challenges and opportunities. Managing multiple sources and vehicles of communications is a challenge for all organizations shifting to a remote work environment. PHI is committed to finding enhanced options to streamline communications among our executive leadership team and with the next level of directors and across the organization to achieve our mission and create a culture of inclusion, excellence and joy in our work.

Overall Scope of Work

Proposals may be submitted in response to one or both Scopes of Work (SOW) noted by this RFP.

If two vendors are engaged in response to the separate and related SOWs, then both vendors will be expected to coordinate key insights with each other to optimize
efficiencies and learning. This step will be essential to ensuring a smooth transition between the scopes of work.

Each scope of work must include assessment, reporting and implementation activities. Current staff and consultant reports will be available as appropriate to ensure smooth and consistent progress toward our goals.

**SOW One: Communications and Team Development**

Successful organizational performance and alignment requires a strong leadership team that is able to communicate and make effective, timely decisions in support of business aspirations.

- Assess the communication and decision-making style of each member of senior leadership (six members), and the effectiveness of the team as a whole.
- Work with senior leadership to define areas for communication, accountability and decision-making improvements within the team.
- Provide insights and learnings for enhanced communications, team cohesion, and team effectiveness.
- Identify software, tools, meeting norms, expectations and behaviors that can be optimized to improve remote approaches to working together to model high impact coordination and a culture of leadership excellence.
- Suggest structural opportunities and tools for senior leadership and the directors to 1) better communicate issues; 2) coordinate across departments; 3) elevate priorities in the strategic framework, and 4) model healthy organizational cultural behaviors.
- Coordinate with contractor for the Organization Review and Business Alignment SOW identified below, as appropriate for transition of key insights and to promote cohesion and efficiency.
- Develop interim presentations and final report of findings and recommendations for senior leadership consideration to be outlined in the schedule of the final contract.
- Implement check-ins and accountability strategies to support individual growth and team leadership required of highly functioning teams.

**SOW Two: Organization Review & Business Alignment**

The objective of this SOW is to understand PHI’s business model, current trendlines, and aspirations to develop a plan that supports PHI in achieving its business objectives.

- Review PHI’s current business model, processes, and strategic framework.
• Coordinate with current and recent consultants engaged to identify potential new lines of business opportunities and associated risks.
• Document key business model changes and emergent trends for PHI over the past 36 months.
• Support senior leadership to clarify and codify PHI’s immediate and longer term business aspirations for the next 2-10 year horizon.
• Consider the current organizational structure of the Institute and provide insights to optimize organizational design.
• Assess the structure, staffing depth, competencies and coordination of all Central departments in order to understand strengths, gaps, and opportunities.
• Identify business processes, workflows, tools or management structures that can be leveraged for optimal efficiency in a remote work structure.
• Coordinate with contractor for the Communications and Team Development SOW identified above, as appropriate for transition of key insights and to promote cohesion and efficiency.
• Develop interim presentations and final report of findings and recommendations for senior leadership consideration, to be outlined in the schedule of the final contract.

Location(s): Remote. Consideration of any in-person activities in CA will be determined separately.

PHI may issue an Indefinite Quantity Contract (IQC) to the successful respondent 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 either or both opportunities identified in the Scope of Work One or Scope of Work Two. Include 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
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. Please note references by SOW focus if you are applying for both SOW components.

**Submission of Proposals & Closing Time:**

Please submit proposals to: Lisa Stauber, Executive Assistant to CEO

Email: lstauber@phi.org

Proposals are due by: **Friday, February 4, 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, PHI 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).

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:

- 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

<table>
<thead>
<tr>
<th>No.</th>
<th>Position/Title</th>
<th>Name</th>
<th>Hourly Rate Rate*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

*This should be a fixed burdened hourly rate.