



## Request for Bids: Trauma- and Resiliency-Informed Systems Initiative: Organizational Change Consultant and Assessment Administrator

### Background

After undergoing an extensive process to map the early childhood mental health landscape and gather input from a broad community of stakeholders, the First 5 San Mateo County Mental Health Systems Building Steering Committee recommended prioritizing the development of an Early Childhood Trauma-Informed Systems Initiative, with a specific goal of launching this initiative to help young child- and family-serving organizations and systems become more trauma-informed in their operations as a first step. This recommendation was approved by the First 5 SMC Commission on January 22, 2018.

Since the approval of the recommendation, and with additional and continuing funding from the Mental Health Services Act and Sequoia Health Care District, First 5 SMC continued to convene its Trauma- and Resiliency-Informed Systems Initiative (TRISI) Implementation Team to advise on the Initiative. In the first two years of the Initiative, First 5 SMC became the moderator of the San Mateo County ACEs Connection (now PACEs Connection) site, which serves as a virtual hub for information sharing among local stakeholders. In addition, First 5 SMC conducted a market assessment to determine interest among local child- and family-serving organizations for participating in an effort focused on promoting trauma-informed organizational practices and explored the best format for providing this. In November 2019, First 5 SMC responded with a day-long countywide event to launch our trauma-informed systems work, “Culture of Care”, which drew nearly 40 agencies or County departments and 200 participants.

Guided by the strategic advice of our TRISI Implementation Team, in the fall of 2020, First 5 SMC issued an initial procurement process to support the rollout of the following three components of TRISI: (1) Trauma-Informed Organizational (TIO) Practices Assessment Tool, (2) cross-agency learning cohorts, and (3) individual agency coaching. The process resulted in onboarding two agencies: Hamai Consulting and East Bay Agency for Children’s Trauma Transformed, in addition to our original strategic consultant LFA, to support these functions.

In 2021, First 5 SMC with support from its consultant team, provided two educational sessions for local child- and family-serving providers to learn more about TIO practices and the TIO Practices Assessment Tool, supported nine local agencies to complete the TIO Assessment Tool with over 350 individual responses, and launched two cohorts comprised of representatives from six nonprofit agencies or County departments. Each agency also received individual coaching parallel to the cohort offering to support TIO-focused growth.

With growing demand within local child- and family-serving systems, First 5 SMC has begun to roll out a second round of the assessment, multi-agency cohorts, and individualized

organizational agency coaching model. The focus for this round will be on large, countywide public agencies, which warrant extra attention toward their structures and mechanisms to support culture change.

## Statement of Intent

**F5SMC is seeking quotes for the role of Organizational Change Consultant and Assessment Administrator to support a tailored and distinct role for this Initiative.** Individual consultants or individuals/teams embedded in larger consultancies are eligible to apply.

The other roles vital to TRISI; that of Initiative Design Consultant, Cohort Facilitation, and Organizational Coach; are already filled by consultants or consultant teams that have held these roles and intend to continue. These consultants will work collaboratively to serve unique functions and to help craft and carry out the strategic vision for this effort in partnership with First 5 SMC staff and the TRISI Implementation Committee, a panel of local practitioner experts that serve as an advisory council.

The tasks and qualifications outlined below are suggested for the role of Organizational Change Consultant and Assessment Administrator, but should not be limited to the list provided. The final scope of work and deliverables will be established with the successful bidder during contract negotiations with First 5 SMC prior to the start of the project.

## Desired Tasks and Qualifications for Organizational Change and Assessment Administrator

- Significant experience supporting large agencies through organizational change processes and strategic planning and implementation efforts to achieve specific outcomes
- Experience supporting large-scale survey administration design and backend support, as well as data cleaning and analysis
- Experience evaluating strategic planning and organizational change efforts
- Strong ability to establish trust and build rapport with internal and external stakeholders, including executive leadership of large public agencies
- Deep experience working in or with large child- and family-serving public agencies, the unique dynamics and cultures of such institutions, and supporting implementation of trauma-informed practices within large public bureaucracies
- Commitment to working with F5SMC staff and current consultant team to design, align, and achieve collective goals
- Strong collaboration and communication skills
- Knowledge of San Mateo County and of child- and family-serving organizations and professionals
- Responsive communicator with effective time-management skills

## Budget

The proposed budget for the Cohort Facilitation role for the 9-month term should not exceed \$50,000. Budget estimates should include hourly estimates for the work proposed if based on deliverables.

## Timeframe

The anticipated timeframe for service delivery for this role is from October 1, 2022 through June 30, 2023. The timeframe and approach to cohort structure may change due to the uncertainty created by the COVID-19 pandemic and coordination with target agencies and will likely need to remain nimble.

## RFB Process

This Request for Bids is not a commitment or contract of any kind. First 5 SMC reserves the right to pursue any and/or all ideas generated by this RFB. The responses will be used to determine the respondent's ability to render the services to be provided. The failure of a respondent to comply fully with the instructions in the RFB may eliminate its response from further evaluation as determined at the sole discretion of First 5 SMC.

## Response Submissions

Responses must address content areas 1 through 5 on the following pages and should be single spaced with 12-pt font. Submit an electronic copy of your response via email to Myra Cruz at [ecruz@smcgov.org](mailto:ecruz@smcgov.org) and Emily Roberts at [eroberts@smcgov.org](mailto:eroberts@smcgov.org). All responses must be received by 3 pm on Friday, September 2, 2022.

## Review Process

All submissions will be reviewed by staff at First 5 SMC. During this process, First 5 SMC may require a respondent's representative to answer questions orally and/or in writing or request an interview. If so, we will notify the primary contact noted on your bid to schedule a time.

The criteria used as a guideline in the review will include, but not be limited to, the following:

- Agency qualifications and experience, including capability and experience of key personnel to deliver desired functions,
- Overall project strategy, including approach to fulfilling the proposed role and partnering with other agencies and individuals,
- Ability to articulate how trauma-informed organizational practices are important to serving children and families,
- History of successfully working with large public agencies, organizational leaders, and diverse stakeholders from multiple sectors
- Familiarity with issues confronting families with young children in San Mateo County
- Cost
- Clarity of oral and written expression
- Compliance with requirements of submission as outlined in this RFB document

**The decision made by F5SMC will be communicated via email and will be final.**

### **1. Independent Consultant or Agency (no more than 1 page)**

Please provide the name and address of the contractor or consultancy submitting this bid. Include the number of years the entity has been in business and its experience working with the public sector on projects with a focus on trauma-informed practices, particularly those focused on organization or systems-level approaches. Provide brief descriptions of similar projects that your entity has successfully undertaken.

### **2. Personnel (no more than 1 page per role)**

Please provide the name and title of each individual who will be working on this project, the specific function that they will be performing for the Organizational Change Consultant and Assessment Administrator role(s), and a brief description of their relevant qualifications and experience, including technical skills or areas of expertise. Include each consultant's hourly rate. You may attach résumés if you'd like; these will not count toward the one-page limit for this section.

Indicate which individual is the contact person for this project and provide that person's phone number and email address.

### **3. Timeframe (no more than 1 paragraph)**

Provide the date by which your entity will be available to start this work, and any lead-time or startup requirements that you may have. If you have an internal deadline for project completion (e.g. because a key staff member is going out on leave), include that information here as well. Due to current circumstances, timeframes are necessarily fluid and will be regularly re-evaluated based on public health orders, and the capacity of potential participating agencies and of First 5 SMC. Please include in your response how you or your agency would address such changes in the timeframe or approach to accommodate such issues.

### **4. Insurance (no more than 1 paragraph)**

The County has certain insurance requirements that must be met. In most situations those requirements include the following: the contractor must carry \$1,000,000 or more in comprehensive general liability insurance; the contractor must carry motor vehicle liability insurance, and if travel by car is a part of the services being requested, the amount of such coverage must be at least \$1,000,000; if the contractor has two or more employees, the contractor must carry the statutory limit for workers' compensation insurance; if the contractor or its employees maintain a license to perform professional services (e.g., architectural, legal, medical, psychological, etc.), the contractor must carry professional liability insurance; and generally the contractor must name the County and its officers, agents, employees, and

servants as additional insured on any such policies (except workers compensation). Depending on the nature of the work being performed, additional requirements may exist. **Please indicate whether your entity can meet these insurance requirements or note any questions or concerns you may have.** Please note that in some circumstances, these requirements have been waived and inability to meet these requirements does not automatically disqualify proposers.

**5. Activities and Budget (no more than 2 pages)**

Complete the Proposed Activity and Budget table below. You may add rows if needed. Please note that activities and budget will be agreed upon and finalized during contract negotiations if your Bid submittal is recommended for funding.

**Scope of Work Table**

| Activity | Estimated Hours | Estimated Cost | Person(s) Responsible |
|----------|-----------------|----------------|-----------------------|
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## Additional Information

The information on the other three consultant roles below describes the additional functions already being filled for the initiative. It is provided for reference only.

### *Desired Tasks and Qualifications for Other Roles*

#### Initiative Design Consultant

- Deep content expertise related to trauma and trauma-sensitive practices at an organizational level; the impacts of trauma and adverse childhood experiences for individuals and communities; strategies to support healing and mitigation of trauma; and knowledge of child- and family-serving sectors, agencies, and organization
- In partnership with F5SMC staff, develop a high-level vision for the learning cohort(s), including structure, goals, outcomes, and supports
- Advise on and support a trauma-informed approach to the TRISI initiative and cohort design
- Identify linkages to other regional, statewide, or national efforts to learn from and leverage
- Co-develop the structure and materials for cohort convenings with F5SMC staff and Cohort Facilitator, including agenda, themes, and content
- Leverage existing relationships and connections to help identify other theme- or content-specific leaders to contribute to cohort sessions
- Summarize and create visuals or graphic representations of key outputs and outcomes of learning cohort for review by F5SMC staff, Commissioners, and potential partners
- Prepare for, attend, and present at F5SMC Commission Meetings as requested
- Attend ongoing meetings, initiate check-ins, and correspond with F5SMC to manage the project, as requested
- Strong collaboration and communication skills
- Though not a requirement, knowledge of San Mateo County child- and family-serving professionals, agencies, and the landscape of service provision is a plus

#### Cohort Facilitator

- Significant experience with group facilitation and adult learning principles, including planning for, leading, and evaluating meetings; structuring a series of convenings to achieve specific outcomes; establishing rapport and expectations with participants to deepen trust; and effective time-management skills
- Deep experience working in or with large child- and family-serving public agencies, the unique dynamics and cultures of such institutions, and supporting implementation of trauma-informed practices within large public bureaucracies

- Particular knowledge of and experience with trauma-sensitive practices and facilitation and ability to guide ongoing learning and maintain open dialogue utilizing these skills
- Commitment to working with F5SMC staff and current consultant team to design and facilitate cohort convenings to support alignment and collective goals
- Co-identification of other theme- or content-specific leaders to contribute to each cohort session and work closely with them to help coordinate content to ensure successful outcomes for each cohort session
- Strong collaboration and communication skills
- Experience and comfort with conducting effective and engaging meetings through online platforms and ability to attend and facilitate in-person convenings intermittently, as desired
- Knowledge of San Mateo County and of child- and family-serving organizations and professionals

#### Organizational Coach

- Knowledge of San Mateo County child- and family-serving professionals and agencies and the landscape of service provision
- Deep content expertise related to trauma and trauma-sensitive practices at an organizational level; the impacts of trauma and adverse childhood experiences for individuals and communities; strategies to support healing and mitigation of trauma; and knowledge of child- and family-serving sectors, agencies, and organizations
- Significant and successful experience with coaching, specifically with agency leaders and staff, to achieve mutually beneficial outcomes
- Nuanced ability to work across sectors and with a variety of agencies and individuals to support adoption and trauma-sensitive practices and to navigate barriers to implementation
- Provide individualized consultation to cohort agencies to develop goals and workplans focused on TIO development
- Serve as the point-of-contact for cohort agencies to support their progress toward becoming more trauma-informed
- Host and facilitate regular technical assistance calls with cohort agencies
- Strong collaboration and communication skills