

**Request for Proposal**  
**Trainer and Consultant: Internal Equity Transformation at Cohort Organizations**  
**Health Equity Advocacy (HEA) Cohort for The Colorado Trust**

**Summary:**

The Colorado Trust Health Equity Advocacy (HEA) Cohort is seeking a Trainer & Consultant (which can be comprised of a single or multiple consultants or groups) to provide technical assistance and capacity building support for the following activities: organizational equity framing, goal setting, action planning and evaluation at individual Cohort organizations; trainings on organizational equity change practices for individuals from Cohort organizations; and equity coaching with organizational leaders and board members at Cohort organizations. We are seeking services that will help Cohort organizations to institutionalize equity and interweave equity into their day to day practices and activities.

Note: The HEA Cohort is releasing [two other RFPs](#) simultaneously with this one. One is seeking a Caucusing Facilitator and the other is seeking a Race Equity Trainer for a broader group of health equity advocates. An individual or group of individuals may apply and be selected for both this RFP and the Race Equity Trainer RFP. But the individuals selected to be our Caucus Facilitators will not be selected for the other RFPs.

**Section I: Background**

The Colorado Trust (The Trust) is a foundation dedicated exclusively to the health and well-being of the people of Colorado. The Trust believes that all Coloradans should have fair and equal opportunities to lead healthy productive lives regardless of race, ethnicity, income, or where we live. The Trust uses a variety of grant making strategies and approaches to advance health equity for all Coloradans. One such strategy has been the [Health Equity Advocacy](#) (HEA) field-building initiative.

With the HEA initiative, The Trust aims to advance health equity policy solutions through a field-building approach led by eighteen grantee organizations (the “HEA Cohort”). Field building involves identifying shared values, framing the work of health equity in terms of those values, developing and broadly communicating shared messages that fit the values frame, training in the use of shared messaging, and building the capacity and skills needed to work in partnership with affected communities and influence an ever-changing policy landscape. The HEA Cohort leading this work includes policy advocacy organizations, direct service providers, and community organizing entities that advocate for, serve, and/or engage communities across the state of Colorado.

Central to the HEA initiative is the understanding that race, ethnicity, income, geography, zip code and other social conditions, collectively referred to as the “social determinants of health,” are at the root of persistent health disparities facing Coloradans. In addition, the HEA Cohort understands that inequities in health and social status are systemic due to the influence inequitable policy decisions and social

conditions have on life chances and health outcomes. Due to the structural nature of inequality and racism, organizations in positions of influence often inadvertently perpetuate inequitable outcomes unless they dedicate sustained learning and attention to creating equitable policies, practices, procedures, and organizational cultures.

The capacity and skill building work of the HEA initiative centers on four spheres of influence:

- **Sphere 1** is made up of individuals from Cohort organizations that participate in the leadership and engagement work of the HEA Cohort;
- **Sphere 2** is made up of the individuals and the internal policies, practices, and procedures at the eighteen Cohort organizations;
- **Sphere 3** is made up of the outward facing work of Cohort organizations and the work of other entities and individuals that Cohort organizations partner with outside of the Cohort in their health equity work; and
- **Sphere 4** is the health equity advocacy field.

With this RFP, the HEA Cohort is looking for capacity and skill building support focused on Sphere 2. Our goal is to bring equity work to scale across the eighteen Cohort organizations so that they can institutionalize equitable policies, practices, procedures, and organizational cultures.

## **Section II: Where the HEA Initiative is with this Work**

Phase III of the HEA initiative, which will last for three years, started in January 2017. During Phase II, each Cohort organization participated in a project called *Impacting Racial Equity through Organizational Transformation: From the Inside-Out*. Through that project, information regarding the equity work at each Cohort organization was compiled from pre-and post-surveys and one-on-one interviews with a consultant.

The data generated from the project was used to locate the HEA Cohort and each Cohort organization on an equity continuum that includes the following stages:

- **Diversity** - when an organization understands the value of having a diverse staff of individuals whose race, ethnicity, gender, sexual orientation, experience, skill set, and education vary.
- **Inclusiveness** - when an organization wants to grow in ways that will celebrate and honor the skills and life experiences a diverse group brings. This phase incorporates the needs, strengths and voices of all employees and seeks to address equity and make cultural shifts to reflect goals.
- **Anti-racist** - when an organization intentionally redistributes power in ways that seek equity and identifies and eliminates all forms of racism by changing systems, structures, policies, practices and shifts attitudes of those within the organization and those associated with the organization.
- **Equitable** - when an organization has gone through a multiyear process that includes trainings, *changes* in organizational policies, and commitment of resources for ongoing work. In this phase, ensuring that disparities do not exist in all aspects of the organization's work is a high priority.

A report from the project is attached to this RFP. As outlined in the report, aggregate data from the project located the HEA Cohort, collectively, at the inclusiveness phase. In addition, aggregate data from the one-on-one interviews identified areas where Cohort organizations desired additional support for continued equity work. Cohort organizations requested trainings on creating cultures of compassion, empathy and empowerment; the role organization executives and other leaders play in driving equity work; and managing organizational culture change, resilience, and disruptive innovation. In addition, Cohort organizations identified a need for consulting support for the development and execution of equity work plans and equity coaching for organizational leadership.

The project consultant located a majority of the individual Cohort organizations at the inclusiveness phase and some at the anti-racist phase. Although information identified by individual organization was not made public, each Cohort organization is in possession of the data that resulted from their individual participation in the project. It will be at the individual organization's discretion whether they will share that information.

### **Section III: Services Needed**

#### **Equity framing, goal setting, action planning and evaluation at Cohort organizations**

Cohort organizations will not be required to engage in equity work planning. In addition, some Cohort organizations have been engaged in equity work for some time and have engaged other consultants that they may or may not continue to work with. But we understand that most of the eighteen Cohort organizations have affirmatively expressed a commitment to continuing internal equity work. The trainer/consultant should be prepared to work with all eighteen Cohort organizations individually and assist them in defining and furthering their equity goals. Cohort organizations are at different places on the equity path. In addition, leadership at Cohort organizations have engaged in the work of the Cohort at different levels and have varying levels of comfort with concepts of structural inequality, racism, and organizational equity. The trainer/consultant should be able to meet each organization where they are on the equity continuum and assist each organization that wants to work with the trainer/consultant in developing an equity work plan that fits the organization's typology, program focus, and goals. Services needed may include additional equity assessment work, equity goal-setting, development and implementation of equity work plans, and evaluation of equity work.

#### **Coordinated training and skill-sharing related to organization-level equity practices**

During the course of participating in *Impacting Racial Equity through Organizational Transformation: From the Inside-Out*, Cohort organizations identified training needs related to organizational equity change practices. Cohort organizations requested trainings on creating cultures of compassion, empathy and empowerment; on the role organization executives and other leaders play in driving equity work; and on managing organizational culture change, resilience, and disruptive innovation. Other training areas may include developing equitable hiring practices; creating organizational equity policies; making programs and services equitable and inclusive; holding difficult conversations around racism, equity and inclusion; and developing and using an equity lens to guide organizational decision-making. In addition, the trainer/consultant should, where possible, coordinate trainings between Cohort organizations with

similar training needs and facilitate skills-sharing between organizations that do similar work but that are at different locations along the equity continuum.

#### **Equity coaching with organizational leaders and board members at Cohort organizations**

Cohort organizations have identified a need for coaching for organization leadership, including executives, directors, and potentially board members. Leadership at the different Cohort organizations have varying levels of comfort with the concepts of structural inequality, racism and organizational equity. The trainer/consultant should be able to meet the leadership of Cohort organizations where they are and work with organization leaders that are interested in equity coaching.

#### **Section IV: Management of Contract**

The Organizational Equity Trainer & Consultant will be an independent third-party contracted directly with The Trust and reporting to individual Cohort organizations and the Racial Equity Team, made up of HEA Cohort leaders.

Report Out: The trainer/consultant will be required to:

- Maintain the regular contact with up to eighteen Cohort organizations located across Colorado. Contacts must be sufficient to meet each organization's equity work planning and implementation goals;
- Collect and document progress made by individual Cohort organizations along the equity path and track capacity and skills building needs at individual Cohort organizations;
- Report aggregated, de-identified information on the progress of Cohort organizations and on remaining organization-level capacity building needs of Cohort organizations to the Race Equity Team; and capacity building needs to the Race Equity Team once a quarter;
- Video record all trainings; and
- Communicate with other professionals hired by the HEA Cohort to train, consult on, or facilitate other aspects of the HEA Cohort's equity work on a regular basis.

#### **Section V: Equipment and Systems**

The contractor will be expected to use their own computer equipment. The contractor will be expected to have their own workspace. Black and white printing of documents needed for the listed activities will be provided as necessary. Access to a conference call line and/or webinar service will be provided as needed. Rooms for group trainings and technology for recording trainings will also be provided.

## **Section VI: Qualifications and Proposal**

The trainer/consultant may be an individual or a team from an organization. An ideal contractor will have experience in organizational equity transformation. The contractor should have a clear understanding of what the social determinants of health mean in diverse communities and, ideally, across the diverse and unique socioeconomic and geographic contexts of Colorado. The contractor should also have an understanding of racial equity and be able to conduct their work with a racial equity lens. The contractor must be available to meet separately with up to eighteen Cohort organizations often enough to meet each organization's equity related goals. Proposals from outside Colorado are welcome but must demonstrate how they will serve up to eighteen Colorado organizations located throughout the state. Reimbursement for travel to in-person meeting(s) will be provided.

Proposals must include the following elements, in order. Proposals should only be in MS Word or PDF format. Our intent is for the proposal writing and reviewing processes to be expedient and not overly burdensome. Your brevity is appreciated. Please send a complete proposal that includes the above elements to Noelle Melchizedek by 5 p.m. MT on June 1, 2017.

- 1. CONTACT INFORMATION**
  - a. Provide your name, organization (if appropriate), and contact information.
- 2. SERVICES NEEDED**
  - a. Describe how you will address all services listed in Section III.
- 3. ORGANIZATIONAL EQUITY TRANSFORMATION EXPERIENCE**
  - a. Describe your organizational equity transformation experience and approach, including any work on similar projects, and the services you provide.
- 4. SOCIAL DETERMINANTS OF HEALTH**
  - a. Describe your experience and understanding of and experience with health equity, racial equity, and the social determinants of health.
- 5. PROJECT COORDINATION and HEA COHORT**
  - a. Describe how you plan to manage the project and communicate and coordinate with the HEA Cohort (including the project's team).
- 6. COST**
  - a. Provide a cost plan for the Services Needed.
- 7. RESUME**
  - a. Provide your resumes, and/or background and skills for individuals that will provide services under the proposal.
- 8. REFERENCES**
  - a. Provide names and contact information for up to three references who can speak to your experience.

## **Section VII: Timeline & Questions**

### **TIMELINE**

Proposal deadline = June 1, 2017

Proposals reviewed and questions to applicants expected = June 16, 2017

Final decision expected = June 30, 2017

Work expected to begin = July 14, 2017

Work expected to end = July 13, 2018

### **QUESTIONS**

Questions can be directed to Noelle Melchizedek at [noelle@coloradotrust.org](mailto:noelle@coloradotrust.org). Please include "INTERNAL EQUITY TRANSFORMATION TRAINER AND CONSULTANT" in the subject line.

# Impacting Racial Equity through Organizational Transformation

From the Inside Out



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The logo for Angell Perez Consulting, featuring a stylized 'A' and 'P' inside a circular frame with the text 'ANGELL PEREZ CONSULTING' around it.

# **Impacting Racial Equity through Organizational Transformation**

## **From the Inside Out**

A Project of FRESC Good Jobs, Strong Communities

Final Report Compiled by  
Angell Pérez Consulting LLC

On behalf of **FRESC Good Jobs, Strong Communities** and **Angell Pérez Consulting: Transforming Individuals, Organizations and Communities**, we share this report. Through FRESC's project ***Impacting Racial Equity through Organizational Transformation: From the Inside Out*** funded by **The Health Equity Advocacy (HEA) Cohort**, information was compiled from pre-and post-surveys, and one-on-one interviews with the consultant and participating organizations. This report includes aggregate survey data, feedback regarding the process and the health equity work supported by HEA Cohort, and finally, requests and recommendations from participating organizations for future equity work.

### **Participating Organizations**

Asian Pacific Development Center  
Colorado Association of Local Public Health  
Colorado Center on Law and Policy  
Colorado Children's Campaign  
Colorado Coalition for the Medically Underserved  
Colorado Cross Disability Coalition  
Colorado Fiscal Institute  
Front Range Economic Strategy Center  
Full Circle of Lake County Inc.  
Grand County Rural Health Network Inc.  
Growing Healthy Communities Coalition  
Northwest Colorado Health  
Re:Vision  
Together Colorado  
Tri-County Health Network



## **What we Learned**

### **Heath Equity Advocacy (HEA) Cohort Organizations are Committed to Having Conversations about Equity**

It is evident that there is a true desire among cohort members to weave equity work into the fabric of their organizations to better meet missions, and have stronger impacts on the communities they organize, provide services to and advocate for.

Pre-and-post surveys were implemented with HEA Cohort members to help guide future equity work. These questions were designed to measure knowledge base, commitment, skill set and actions taken in two areas; (1) directly driving equity work regarding race and (2) organizational culture for change. One-on-one interviews were also conducted between the consultant and organization's leadership or designated staff. Data from the pre-and-post surveys and one-on-one interviews show that the majority of the HEA Cohort organizations have had very intentional conversations about what it means to integrate equity approaches in their mission and overall work. Organizations have acknowledged that this journey is needed and they are committed to pursuing this work.

This is an enormous step in the process as there is no need to convince organizations that this work is critical which is a vast strength for the cohort. This is strongly in part to HEA Cohort's commitment, encouragement and dedication of resources that empower cohort organizations to come up with their own priorities.

### **Most cohort organizations are stuck**

In the analysis of the one-on-one interviews the major theme that emerged was that conversations about equity work have taken place with organizations who participated. However, most of the organizations seem to be stuck in the place of conversation and are eager to move forward. Organizations expressed they are ready to take action yet do not know the next steps and voiced needing guidance.

1. Cohort members are not stuck due to lack of commitment or valuing equity, but because folks are unsure of how to move forward in an intentional way to support meeting equity goals.
2. Information gathered from one-on-one interviews also show organizations are committed to moving beyond conversations and ready to take action on all levels (continued knowledge building, skill building, building infrastructure, organization culture shifts, policy etc.).
3. At every conversation and on every survey, cohort organizations are seeking approaches that are an investment in sustaining the equity for the long hall and need support in doing so.

To conclude, much more direction is needed to support organizations in moving the journey forward. Moving beyond conversations is the next step of making the work institutional for most organizations within the cohort. Many have begun to take steps, which is extremely promising, however these same organizations expressed a need for expert leadership in the process. I highly recommend prioritizing the following:

Hire consultant(s) to:

- Support organizations in developing equity plans specific for their organizational needs
- Facilitate opportunities for mentoring and coaching across the cohort
- Provide group trainings for HEA Cohort organizations at various locations throughout the state
- Support policy organizations develop communication plans
- Conduct research and gather resources to create a resource bank or library

## **There Are Mentors Among Us**

There are a handful of organizations within the cohort in the anti-racist phase that have pushed the needle forward in immense ways. These organizations can be utilized as an example for other organizations within the cohort. The HEA Cohort should lean on these members for their expertise in addition to seeking external support. Organizations expressed the advantages of not being alone in this process and having fellow organizations to share the journey with.

Some of the characteristics of these organizations include:

- Have made a public statement regarding their commitment to equity
- Created equity committees or leadership group
- Hired consultant(s) to guide work
- Developed equity plans
- Driven policy change within their organizations
- Intentional hiring that includes people of color, various sexual orientations, various gender identities, diverse abilities
- Leadership consists of people of color/LGBTQI/queer/various gender identities/various abilities and also reflect constituents
- They have designated funding for sustainable equity work

## **Making Space – Meeting Organizational Needs**

Many cohort members stated that one of the important elements of the work was the creation of safe spaces to unpack equity and race. Also, the general operating commitment from The HEA Cohort has made it easier to advance commitments to equity work and make it a priority for organizations. Some specific responses:

1. Members expressed that previous to The HEA Cohort it was difficult to find the support needed to prioritize this work.
2. Those who participated in the interviews all expressed how beneficial the “Impacting Racism through Organizational Transformation: From the Inside Out” Tool Kit has been.
3. Some common themes that came out during one-on-one conversations was (1) a desire for more opportunities for group learning, (2) more workshops/trainings/retreats on racial equity, (3) organizational access to a consultant or racial equity expert to guide work specific to organizational needs and for (4) organizations to share best practices across the cohort.

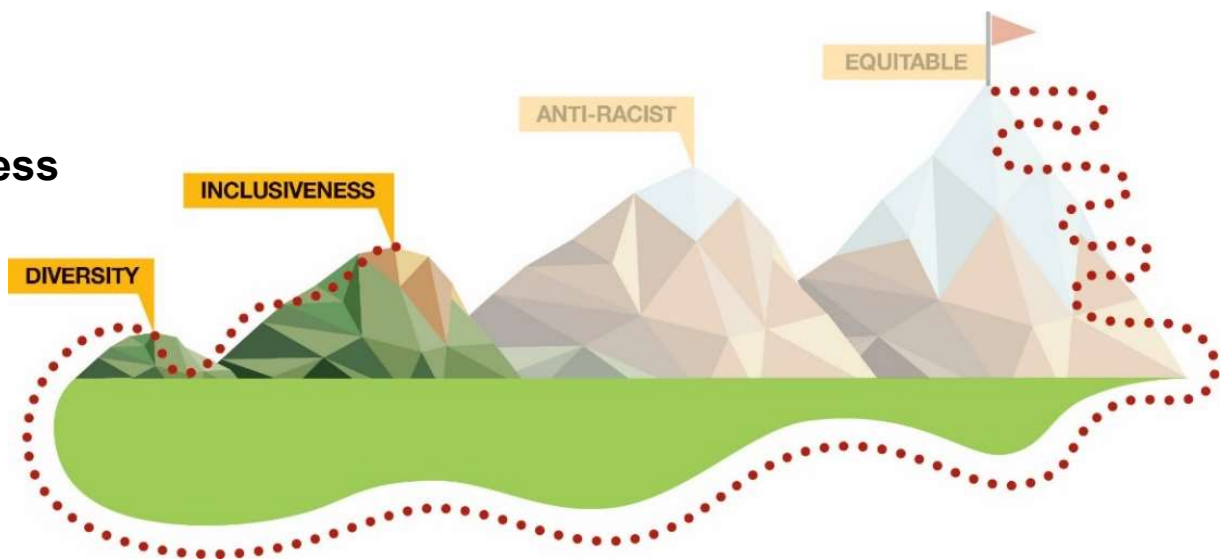
Finally, across the board, organizations are relying on The HEA Cohort as a convener of this work and expressed deep gratitude for the commitment of The HEA Cohort and The Colorado Trust.

**Collectively, data positions the cohort at:**

### **Inclusiveness**

Most organizations in this phase want to grow in ways that celebrate and honor the skills and life experience a diverse group brings. This phase incorporates the needs, strengths and voices of all stakeholders and seeks to address equity and make cultural shifts to reflect goals. This phase includes conversations, verbal commitments and the development of actions steps to take to further the work.

## **Phase 2 Inclusiveness**



## **NEEDS, RECOMMENDATIONS FEEDBACK FROM INTERVIEWS**

### **One-On-One Interviews**

The one-on one interviews with organizational leaders and designated staff provided the richest data and understanding of where organizations are. With every organization, there was a compelling desire to push equity work forward. Individuals all expressed the value of equity work and a commitment to continue to shift organizational cultures to meet equitable standards and become models for other organizations within the cohort, and their communities. Members feel confident in their understanding of the need for this work but expressed across the cohort needing specific support to begin taking actions steps towards becoming equitable organizations.

Some of the most salient themes that resonated from the meeting were; (1) the need for various forms of trainings, coaching and resource support, (2) the opportunity to utilize the strengths of the HEA Cohort by tapping into organizations who have made significant strides towards becoming equitable (3) organizations within the cohort need to be woven together into a more integrated whole that is comprehensive and collaborative, (4) safe spaces need to continue to be established where equity work is not placing blame but sharing responsibility and accountability, (5) intentional support and resources need to be provided for people of color within the cohort so they can show up authentically in ways that are healthy and empowering.

Although organizations have specific needs based on work that has already been done within their organizational culture, mission and staff make-up; the most common theme was the continued desire to engage in this work together within the cohort because this has made the journey thus far easier and more impactful.

The following boxes outline aggregate qualitative data from interviews with organizations. Compilation of feedback from interviews have been placed in two categories; Training and Resources. These categories were chosen based off of the themes within the interview data across organizations and are listed with most salient first. Within the category boxes there is a brief explanation as to why the top three suggestions were chosen. Feedback that was prominent is also listed in the final box, it is important to share these particular comments which can be incorporated into the early stages of planning.

#### **Trainings:**

- Communication & Common Language
- Creating Cultures of Compassion/Empathy/Empowerment
- Retreats/Healing Circles/Professional Development for POC
- Facilitated Caucusing
- History of Race/Racism/Oppression Specific to the U.S.
- White Privilege/Working with Poor White People/Whiteness
- Executives or Leaders Role in Driving Equity Work
- Managing Organizational Culture Change/Resilience/Disruptive Innovation
- Interactive/Hands On/Skill Development/Theater of the Oppressed
- Center for Social Inclusion Training
- Kaiser's "Loose Change Training"

Developing a communication plan among cohort members with ground rules that that can be used to redirect members when challenges arise throughout the journey will set the foundation for continued work. Building a team whose values are rooted in compassion, empathy and empowerment will sustain the work through the long haul. Creating a foundation in which members are personally committed and vested in one another will form connectedness, dedication and responsiveness. People of color carry this work in ways white people do not. This work is substantial for all involved, however people of color live through everyday experiences that can be oppressive, in addition to the load of navigating through equity work in their professional lives. All the items listed are all extremely important and attention should be paid to all. The prioritization was to provide direction as to where to begin.

### **Resources:**

- Follow up to Undoing Racism
- Funding to Hire Consultant to Develop/Execute Work Plans
- Executive/Leadership Coaching by Equity Expert
- Equity Best Practices from Across the Country
- Readings/Reports/Equity Resources
- Ideas for Boards of Directors Engagement and Trainings

Undoing Racism was a profound experience for everyone that participated and everyone expressed the desire for a follow up conversation to continue to unpack their experience with HEA Cohort colleagues. Timeliness is important and this gets done as soon as possible to ensure efforts are made to capture member's vivid recollection of their experiences to help guide the work moving forward. Hiring a consultant or team of consultants to address the various areas of support needed is critical at this point. It will inform the work and keep the momentum going while members are still impassioned from Undoing Racism, Facing Race and the Impacting Racial Equity through Organizational Transformation project. Members expressed emphatically the desire to have a neutral, expert in the field of equity to lean on and get guidance, training and support from. Lastly, it would be extremely beneficial to provide intentional support/training/coaching to executive directors/organization leaders that will help support them in championing equity work within their organizations and the ability to support their staff when needed. Cultivating leaders in this way creates efficiency and a multipronged approach to driving equity work in organizations, within the cohort and community at large.

### **Feedback:**

- Providing gatherings where organizations can present on their equity work to share ideas
- Support ways to engage in equity conversations in the "real world" (the cohort is a very safe space to unpack our experience but it gets hard outside of that space)
- The survey for this project was great but it seemed a bit impersonal, I know this is just a starting point but having facilitated focus groups with the consultant would have gotten more valuable, intimate information, this is needed
- The toolkit is great and there are things we can implement now, but some of the deeper activities need to be facilitated by an outside expert
- More full day trainings focused on equity (the Steamboat Springs training was great but it was too short to really dive in)
- Regular equity trainings, perhaps quarterly

### Understanding the survey:

The answer categories of the survey were designed to align with the various phases of the Scale of Organizational Transformation as follows:

**Diversity** ↔ Haven't started work in this area yet

**Inclusiveness** ↔ Plans Exist to use in planning and implementation  
↔ This is in place and we have evidence of its use

**Anti-racist** ↔ This is part of our routine, and we will model it for others

Overwhelmingly, most organization's answers fell in the inclusiveness phase in surveys. Survey data shows many organizations have engaged in conversations about equity, deemed equity important and have made the commitment to creating equitable organizations. Survey information demonstrates that some actions have been taken; however, they have not been weaved into the fabric of their organizations nor is it routine. Survey answers also indicate that organizations have some mechanisms in place to support culture shifts which will support equity work moving forward.

Three organizations demonstrated tangible actions driving equity within their organizations. Equity is a part of the cultural norm within these organizations; apparatuses are in place to hold employees and partners accountable to equitable standards and these organizations model equity in the community.

**Yes**

**No**

**I don't know**

Questions with the YES/NO/ answer choice were affected by the choice of I DON'T KNOW. Meaning, answering yes could indicate the organization could be at the inclusiveness phase or the anti-racist phase. The answer choice of "I don't know" is factored in to support the analysis. "I don't know" indicates that there is a lack of knowledge regarding the particular work examined in the question for some members. This will sway the answer because although some may have answered "yes", if some members answered "I don't know" that tells us that more work is needed to grow the organization collectively in that area and the understanding or work isn't standard across the organization. If, for example, a handful of employees are unaware if a public commitment has been made regarding racial equity, this indicates more work needs to be done in this area. There were several "I don't know" answers to many of the questions which specifies the need to further integrate this work into all aspects of these organizations, ensuring all staff are on board and have bought into the values of equity.