



For public health innovation

# Request for Proposals for Justice, Equity, Diversity and Inclusion (JEDI) Consultant

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## ***Background and Purpose***

The mission of Trailhead Institute (Trailhead) is to advance innovation and collaboration in public and environmental health. For over 29 years, Trailhead has led and collaborated on local and statewide public health initiatives by supporting and creating partnerships with a diverse set of community, university, and public sector partners. Trailhead believes effective partnerships are essential to addressing the needs of communities, and our approach to partnerships is organic and collaborative by nature.

Before the pandemic, Trailhead launched a 3-year strategic plan that identified collaboration, capacity and justice as our core drivers. This has led to an honest reflection about our role in the public health landscape and how we can better leverage our institutional power to affect long-term systems change rooted in social and racial justice. We understand that our approach to our work must adapt and evolve, and we rely on ongoing conversations with our partners, board and staff about how to navigate this evolution.

At this same time in 2019, Trailhead partnered with [nRhythm](#) to adopt a regenerative approach to all that we do. nRhythm defines regenerative organizations as living, evolving and naturally functioning organizations where abundance and resilience are recurring outcomes of their underlying health. This way of being is transformational, continuous work that views Trailhead as a living system made up of unique, developing members whose well-being and interdependence determine the health of our organization.

We are still learning about and exploring what regeneration looks like in action. In abundance, regeneration actively reverses historic societal inequities and regenerates people and communities. To achieve this, we are learning from a set of [regenerative design principles](#) that are helping us to re-envision Trailhead's organizational roles, operating structures, processes, resource allocation and investment strategies.

In line with regenerative principles, we recognize our limitations in defining what we need at this time and know that this may change.

We also recognize that all aspects of Trailhead can be improved with regard to racial and social justice. Our goal is to strengthen our role as a trusted resource and agent of systems-level change for local and state public health initiatives, and we aim to strengthen our role in

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connecting initiatives and dismantling silos. We operate and implement programming based on the belief that everyone has a right to be healthy and live in a healthy environment. However, the data does not support that this is the living experience of all our communities. In order to address this head-on, Trailhead believes that we must centralize racial justice and dismantle systemic racism both in our own organization and in the systems within which we operate.

To this end, Trailhead Institute is requesting proposals to support us in taking initial steps toward **a stronger racial justice framework** – one in which we work to create conditions in which everyone can be healthy and thrive – across systems and structures, and integrate the work we are doing to become a “regenerative organization” into a robust action plan that outlines how we can better leverage our institutional power to affect systems change.

Trailhead Institute staff and board are committed to taking the steps necessary to make these changes. To date, the Trailhead board has agreed to the organizational drivers (collaboration, capacity and justice) as well as agreed that the board needs to look deeper into justice, equity, diversity and inclusion as part of board practice. Trailhead staff have held regular conversations about white supremacy work culture and regeneration and how they show up in ourselves and our work. The staff has also agreed upon [staff agreements](#) for meetings and behavior. The commitment to make changes includes dedicating time, resources, and energy into the sometimes difficult steps and decisions toward a stronger racial justice framework.

One of the first steps we would like to take is exploring new and different governance models for the organization including the development of a Community and Partner Board to work alongside the Trailhead Institute Board and Staff. We will also be exploring what long term, sustainable action looks like for Trailhead and are seeking input and guidance from a consultant.

## ***Services Desired***

1. Design or inform a sustainable governance structure or strategy for Trailhead to ensure the compensated engagement of communities, partners and those most impacted by systemic racism and oppression.
2. Support Trailhead staff to engage internal and external stakeholders, communities and partners to identify best practices, decision making and engagement for designing a governance structure.
3. Determine a process for deciding who makes up the new governance structure; how decisions are made; terms of participation; etc.
4. Advise on strategies to ensure that this works stays front and center in Trailhead’s ongoing evaluation and strategies to track action items, keep them updated and integrate them into our next strategic plan.
5. Mutually agreed upon plan for regular and consistent communication.

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6. We welcome alternative ideas, considerations and recommendations from expert consultants who apply to provide these services.

This work at Trailhead is long term, however, this contract will be a quick engagement to deliver on the services described above. As additional recommendations or considerations are provided there will be an option to review and extend.

Trailhead Institute operates primarily as a virtual organization whose office location is in Denver, Colorado. Applications are encouraged from consultants who are able to deliver services virtually.

### ***Desired Qualifications:***

- Knows and understands this scope of work and can name when activities start to move beyond this scope. Highlight the need for additional scopes of work, including those that may call for referrals to others.
- Single point of contact
- Grounded perspective in anti-oppressive and anti-racist methods and frameworks that apply/could be applied to the public health sector and its various constituents – governmental agencies, academic, funders, community advocates and non-profits (including Trailhead)
- Expertise facilitating conversations on anti-oppressive and anti-racist practices, approaches and/or the practical application of frameworks within systems and among the people who make up those systems
- Self-directed and takes initiative while also able to navigate effectively in a highly collaborative team environment
- Knowledge on/experience with equitable practices within organizations that are also attempting to influence positive change within systems; inform project budget decisions based on this perspective.

### ***Submittal Requirements***

#### **Timeline and Contacts:**

Application review will start on: **August 8, 2022 and will continue until a consultant is selected**  
Desired start date: **September 2022, though we are open to a start date beyond September based on the consultant's availability**

Please direct inquiries regarding this RFP to [slampe@trailhead.institute](mailto:slampe@trailhead.institute) questions can also be submitted on [this questions page](#). Questions and responses will be added to the [JEDI Consultant Q&A](#).

Email electronic submissions to [Applications@Trailhead.Institute](mailto:Applications@Trailhead.Institute)

Submit in your preferred method including written, video, etc.

Electronic submissions are preferred. If non-electronic submission is necessary please mail to: Trailhead Institute, ATTN: Sarah Lampe,

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1999 Broadway Suite 600 Denver, CO 80202.

### **Before you submit, Interview Us!**

If you would like to learn more about this role and/or about Trailhead Institute before you prepare your application materials, we will be holding **three office hours** during the three-week application period. This offers you an opportunity to schedule a 30 minute call and ask any questions regarding this RFP and/or about Trailhead Institute. [Sign up at Calendly](#) a zoom link will automatically be sent to you upon registration.

If you are unable to make it to the scheduled office hours, check out our [JEDI Consultant Q&A](#).

Please **include the following** information in your RFP application:

1. Background, including:
  - b. Brief description of individual, firm or organization
  - c. Areas of expertise and/or life experience
  - d. Experience working with non-profit clients, public health, and/or in the field of Justice, Equity, Diversity, Inclusion.
  - e. Share something not mentioned in this scope of work that you would like us to know about the key staff who will work with Trailhead, such as something they've kept since childhood, a personal/nonprofessional achievement, something they enjoy doing that causes them to lose track of time, etc..
  - f. Completed Form W 9
  - g. Contact information
  - h. Resume of key staff who will work on the project.
2. Rates and fee structure for the proposed work not to exceed \$25,000.
3. Briefly state your understanding of the services to be performed and your commitment to provide the services as specified.
4. Beyond the scope of this RFP, what services (related or otherwise) do you and/or your organization provide?
5. Provide the name, title, and contact information of three (3) references of clients for whom you have provided similar services.

Please submit required materials in any format, as long as all information requested is included. Trailhead reserves the right to request additional written or oral information to supplement all written statements of qualifications or proposals, to reject any and all proposals and statements of qualifications, and accepts no responsibility for the cost of proposal preparation.

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## ***Cost of Services***

The proposal must include a fee schedule that indicates hourly rates or monthly rates for proposed services. As Trailhead is a not-for-profit entity, any applicable discounts intended for not-for-profit entities would be of interest. Please detail any programs and discounts that may apply.

Respondents should clearly state their pricing structure in response to this RFP. All fees, charges, billing rates, etc. should be explained in detail. Each item must identify all available discounts as stated in above. Charges must be tied to deliverables, which must be identified. Trailhead does not reimburse for vendor out-of-pocket cost. Trailhead does not pay in advance for services.

## ***Evaluation Criteria and Process***

Successful applicants may be invited in to discuss the proposal with members of Trailhead's leadership team and other staff. This presentation/meeting will not be charged to Trailhead.

The hiring team will evaluate and rate each submittal based upon the following criteria:

- Experience evaluating and designing a community drive governance structure rooted in anti-racist methods and frameworks that apply/could be applied to systems (e.g. governmental agencies, academic, funders, community advocates and non-profits) and the people who make up those systems
- Understanding of Trailhead's needs and corresponding services to be provided
- Project approach
- Satisfaction of clients/end users
- Cost

## ***Contract***

Trailhead anticipates an initial 12 month contract, with an option to extend. All fees should be set for a month-by-month term and clearly stated in the proposal. A Master Services Contract is available on request. Finalists will be asked to review and indicate any requested changes to the Master Services Contract prior to receiving an offer.

If selected for this contract, the following additional documents will be required prior to contract execution: W-9 • Certificate of Liability Insurance naming Trailhead as an additional insured and Certificate Holder. • Certificate of Worker's Compensation Insurance • Waiver of Subrogation

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## ***Terms and Conditions of Contract***

The selected consultant will enter into a legally binding agreement with Trailhead Institute that lays out the scope of work, requirements for payment, etc. Including that the contract may be terminated by mutual agreement in writing or it may be terminated at any time by either party by delivery of a sixty (60) day written notice to the other party.

Trailhead Institute is dedicated to providing equal opportunities for all employees and contractors based on job-related qualifications and ability to perform a job, without regard to age, sex, race, color, veteran status, religion, disability, sexual orientation, gender identity, marital status or national origin. Trailhead Institute actively supports working with businesses owned and led by women, people of color, people within the LGBTQ+ community, immigrants or refugees, people with disabilities, and people from low- or moderate-income backgrounds.

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