



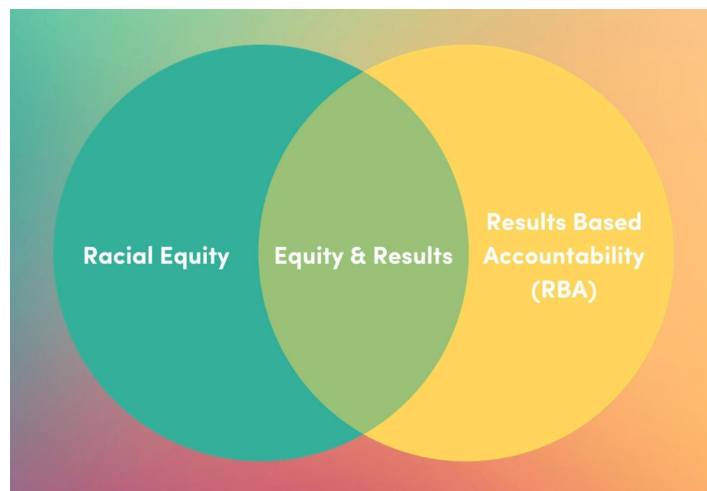
**Revised Proposal for:
Sonoma Department of Health Services
by Equity and Results Consulting LLC
June 2023**

Purpose

Health Departments are critical to transforming disproportionate outcomes in low-income communities, especially communities of color. But this important work cannot have the desired impact without addressing internal and external policies/practices/culture related to equity that impact results. When Health Departments, Like Sonoma DHS that are already committed to equity use equity principles to inform their practices, it interrupts current assumptions about what works. Sonoma DHS can redesign it's strategies and system in ways that produce equity for both staff and communities. This work requires understanding the impacts of institutional and structural inequity from the inside out and the building of strong skills and application of Antiracist Results-Based Accountability. In order to ensure that Sonoma DHS' meets its commitment to "Promoting and Protecting the Health and Well-Being of Every Member of the Community", we must continue to bridge the gap between equity and a rigorous results framework - especially in light of increasing racial disparities exacerbated by the COVID-19 pandemic.

About us

Equity & Results is the national expert in Antiracist Results-Based Accountability. We do systems change consulting using explicit racial equity principles and are an integral part of building organizational capacity to move towards and achieve racially equitable impact, both internally and with BIPOC communities across the country. We have powerfully joined **Racial Equity Principles** with a **Results-Based Accountability** framework to transform organizations' culture and actions to deliver **racially equitable results**.



If organizations and collective impact initiatives are serious about disrupting inequity then leaders need to be disciplined in their approach and ensure that their hard work produces benefit for Black, Indigenous and all People of Color inside of institutions and through the work externally. Groups often struggle to bridge the gap between a commitment to racial

equity and impact driven work. It requires a deep understanding of racial equity through personal and institutional education and training and using a results driven methodology to move an organization from good intentions to transformation.

Antiracist Results-Based Accountability (AR RBA) begins with impact and backs into solutions to ensure that they are selected with an eye to root causes of the inequity. It also requires people to ask whether Black, Indigenous and communities of color are better off, as part of a rigorous seven step process to make sure that Black, Indigenous and communities of color equitably benefit from our work.

More about us:

Equity and Results has researched, used and refined the Antiracist Results-Based Accountability methodology since 2010.

Our trainers/facilitators are located in New York, Oakland, Los Angeles, Portland (OR), Seattle, Atlanta, and New England and our work is done nationally, at the state, county and local levels. Since March 2020, Equity & Results successfully transformed our practice to be 100% online – maintaining all clientele successfully and growing to meet demand. Beginning in 2022, we are happy to resume a hybrid of in-person (25%) and online work (75%).

Our trainers/facilitators are a set of highly skilled professionals who have:

- Explicit and specific competencies in antiracist practice and theory
- 10+ years of advanced facilitation skills prior to joining our team
- Completed apprenticeship/training with Equity & Results on racial-equity centered Results- Based Accountability
- Joined us equitably regarding role, pay, and contract design

Using intentional cross-racial design and co-facilitation teams, Equity & Results' approach brings together the right team to amplify the power and voice of Black, Indigenous and all People of Color. Our team is majority (2/3) BIPOC but also includes white people (1/3) as we have an intentional cross-racial facilitation model.

Current and Former Clients include:

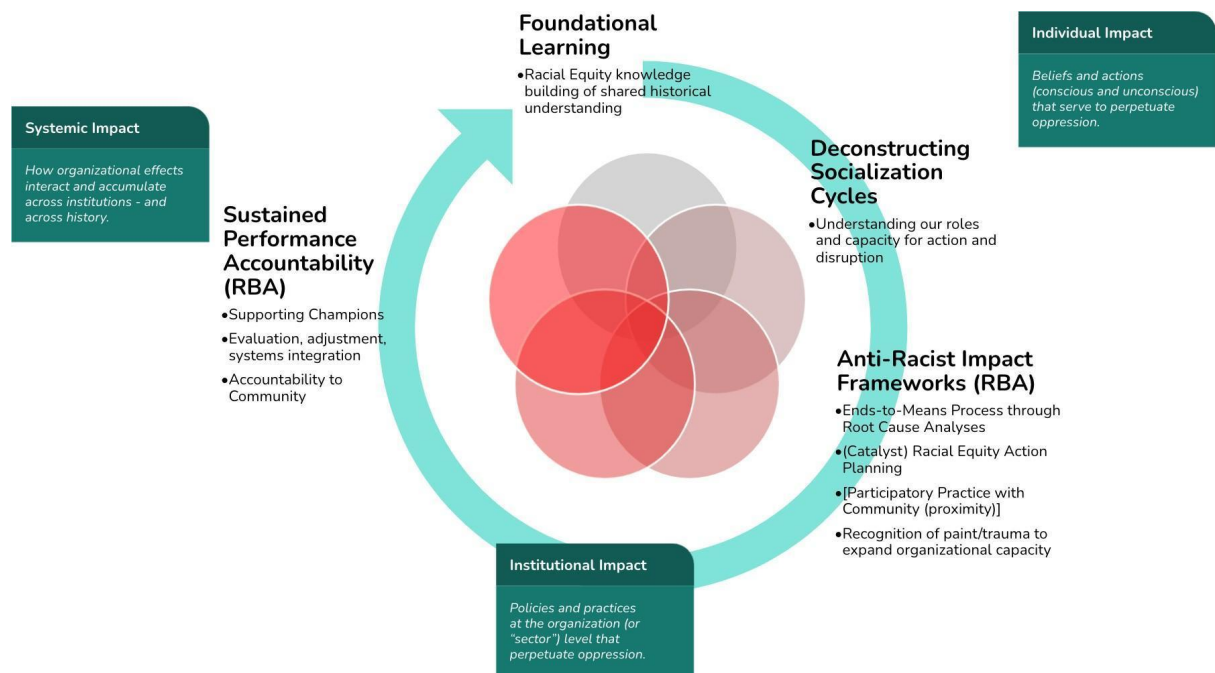
- City of Portland, OR
- Sonoma County, CA
- San Mateo County, CA
- City of New York + 30 Departments (cohort model)
- City of Philadelphia + 25 Departments (cohort model)
- United Way of Salt Lake
- Fairfax County, VA

- Rhode Island Department of Health, 15 Health Equity Zones (Statewide)
- Michigan Department of Civil Rights
- amongst many others

Our Services:

We provide customized, co-designed contracts with organizations to develop **results frameworks, identify strategies for racially equitable impact and put plans into action.** Over time, doing work in this way supports clients to internalize a racial equity-focused results process and culture change required to do meaningful work regardless of where they start. Therefore, our contracts, particularly for larger organizations can range from 12-24 months and beyond in order to get to culture change and impact.

Our contracts are phased to be developmentally appropriate to the organization. *We require our clients to complete explicit racial equity training that focuses on institutional and structural racism prior to or concurrent with a contract with Equity & Results to ensure that teams are ready to shift away from business as usual towards new, impactful work.* We work as a part of an Antiracist Ecosystem of other practitioners that offers foundation setting trainings, affinity group support, coaching and other crucial personal and interpersonal work. We can pull from this collective wisdom when needed and are able to bake this into a contract, as appropriate and relevant for our clients.



Equity and Results' sessions are interactive, applying racial equity principles and the racial equity impact framework to the *real* work of the group. That can include focusing on the necessary internal work like organizational structure, procurement, hiring, cultural norms as

well as external work like designing/refining loan funds, policies, and programs.

We work with organizations as small as 10 people to organizations that employ 2000. Regardless of organization size, our work is successful when a core team of deeply committed participants are building the framework and sharing out with the larger organization, stakeholders, funders etc. for feedback along the way. We have seen core teams of 5-75, with a “sweet spot” of around 20-40 core team members.

Proposed Scope of Work

Our proposed approach for Sonoma DHS centers of the learning and development of a refined impact framework that then moves into action that is aligned with DHS' strategic planning process

Equity & Results recommends the following 2-part, developmental approach to support the Sonoma ' evolution using AR Results-Based Accountability and racial equity principles.

Results of this approach will ensure that DHS:

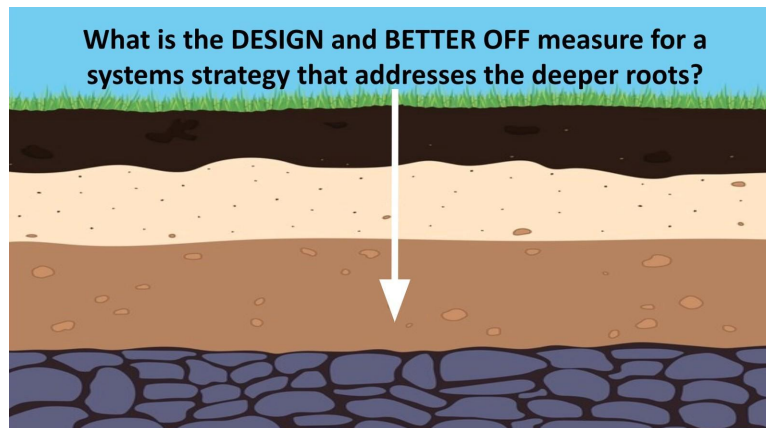
- learns/reviews and internalizes Antiracist Results-Based Accountability process that helps DHS identify and solve for root causes of lingering challenges, both internally and with community members
- meaningfully informs the Department-wide strategic plan to ensure that racial equity is centered in the work of DHS
- builds the capacity or “muscle” to integrate and sustain Antiracist RBA into how Sonoma DHS does it’s data informed racial equity work

Part 1: Antiracist Foundational Education (COMPLETE)

Antiracist Foundational Education builds participants’ knowledge of racism as it plays out in the region and United States. All participants are required to participate in **Antiracist Foundational Education** prior to beginning Part 2.

Part 2: Antiracist Results-Based Accountability Workshops

Part two provides the identified DHS Equity Circle, leadership and others as designated by the Department with a working knowledge of the Antiracist Results-Based Accountability (AR RBA) methodology through a series of workshops. AR RBA is an ends-to-means process that requires us to be guided by the root causes of challenges and to solve for those roots, rather than Band-Aid solutions that can make things worse.



In addition, the methodology helps us ask the critical question, “how do we know that people/ institutions/ communities are better off as a result of our work?” instead of stopping short of impact by merely counting activities. Antiracist RBA transforms usual practices – i.e. developing strategies for staff capacity building and culture change that have nothing to do with the roots of the problem – by coming back to a key set of principles that guide a clear methodology.



We will build and deepen the “muscle” for using a results methodology with embedded racial equity principles for learning and accountability and apply it to strategies that will inform a strategic plan. The process will encourage deep input from staff and stakeholders - redesigning current work to address how internal and external practices, policies and culture either contribute to racial equity or perpetuate racially disproportionate outcomes. Performance measures will be aligned with the indicators that currently guide Sonoma DHS. In addition to workshops, Equity & Results will support the team through team-level coaching.

Through Part 2, Sonoma DHS will:

- Assess key practices, procedures, and policies for opportunities to advance racial equity through root cause analysis;
- Develop common framework that will help inform a overarching strategic plan for internal and external strategy; and
- Build the capacity of participants to be Antiracist RBA champions to drive and sustain the work in an ongoing way after E&R's engagement.

More specifically, this will look like:

- **Big group workshops** to explore, socialize and build the overarching results for racial equity framework for the work
- **Support to smaller teams/individuals** to ensure that team internalizes the content of big group sessions and progresses through the framework. This includes individual leadership sessions and coaching as needed.
- **Session Support and thought partnership with lead/s on strategic planning**

Phase 3: Train-the-Trainer

AR RBA Facilitators' Train-the-Trainer (TtT) workshop series is an advanced series for **up to 20 skilled facilitators** who have also fully participated in the Phase 2 AR RBA Series and Antiracist Foundational Education. The series will be customized for the group but will follow a similar trajectory to the one named below.

- **Session 1:** Refresher on the Principles of Racially Equitable Impact and Antiracist RBA + Q&A
- **Session 2:** Leading the AR RBA/Facilitation - Tactics, lessons learned, practice
- **Session 3:** Learn and Demonstrate session - Skillset: Root Cause Analysis
- **Session 4:** Learn and Demonstrate sessions - Skillset: Root Cause Analysis to Strategy Development
- **Session 5:** Learn and Demonstrate sessions - Skillset: Better off/Performance metric Development and Q&A

Part 3 will also include strategic plan Integration/Braiding Sessions with Strategic plan leads to ensure that learnings and strategies from AR RBA sessions are deeply integrated into the plan.

Roles and Responsibilities

E&R core roles and responsibilities include:

- Preparation, design and facilitation of all session work;
- Development of short “homework” assignments to be completed by group participants in between sessions and workshops;
- Small team-level support between large group sessions;
- Recurring check-ins between E&R and main points of contact to co-design agenda and expectations and troubleshoot challenges;
- Zoom account for virtual sessions.

Sonoma DHS core roles and responsibilities include:

- Communication and logistic coordination, including calendaring large and small group sessions Lead in-person session logistics and budget, including location identification, parking and food/beverages (if applicable)
- Regular attendance and engagement by leadership (or a subgroup of decision makers) in all sessions;
- Own the broader context/framing that this effort will sit within, including impact desired, root causes solving for, and potential impact measures once the sessions have concluded so that the work continues
- Conduct periodic check-ins with participants, to ensure any questions and concerns are addressed in a timely manner, and to collect participants “homework” assignments prior to workshops as applicable

Cadence of Sonoma DHS Engagement

E&R recommends the following approach to support Sonoma DHS' development and implementation of an antiracist impact framework, rooted in racial equity principles and AR Results-Based Accountability.

This engagement would take place between for approximately 12 months and would include the following elements:

Phase 1: Complete

Phase 2: AR RBA Workshops (August 2023 - April 2024)

Items/Sessions	Hours/Days	Rates
Antiracist Results Based Accountability Workshop Series - 10 X ½ day virtual sessions (2-3 <i>in-person sessions are preferable</i>)	10 half-day sessions or 5 full-day sessions X \$12,000/day	\$60,000 (+ *\$3000 per in-person trip)
Support & Coaching on methodology integration and application for small groups - monthly	1 hr/month X 5 teams (approx) X 6 months X\$225/hr	\$7,875
Planning and alignment calls with team and Internal Prep and materials development	30 hrs X \$225/hr 20 hrs X \$225/hr	\$11,250

Phase 3: Train-the-Trainer (May 2024 - August 2024)

Items/Sessions	Hours/Days	Rates
AR RBA Train-the trainer 5 X ½ day virtual sessions (or 2.5 in-person session) (Small group of max 20)	5 half-day sessions or 2.5 full-day sessions X \$12,000/day	\$30,000 (+ *\$3000 per in-person trip)
Integration/Braiding strategic planning thought partnership Sessions (virtual)	2 half-day session or 4 ¼ day sessions X 12,000/day	\$12,000

Travel

We reserve the right to decline travel. We reserve the right to move from in-person to virtual sessions due to COVID exposures.

*Our rates do not include direct travel costs. Hotel, ground transportation, flights and food will be added at a flat rate of \$1500 per person/per trip/day at a flat rate.

All travel requires a minimum of a full day's session work - and may require combining two segments.

Session Cancellation Policy for 2023

The following policy applies to in-person and virtual sessions with E&R. All good faith efforts will be made by E&R to avoid fees.

Virtual Session Cancellation Policy

- 30 days and more notice cancellation = no penalty
- 0-29 days = 10% penalty

In-Person Session Cancellation Policy

- 60 days or more = no penalty + nonrefundable travel 30-59 days = 10% penalty + nonrefundable travel
- 15-29 days = 25% penalty + nonrefundable travel 7-14 days = 50% penalty + nonrefundable travel
- 0-6 days = 100% penalty + nonrefundable travel

Courtesy policy

If 30 days or more prior to an in-person session, client requires a virtual session instead, they may do so at no cost by:

- using ½ of the original date as Part 1 of a virtual 2-part series
- immediately scheduling Part 2
- paying any nonrefundable travel

Rates

Phase 1: Antiracist Foundational Education (COMPLETE)

Phase 2: AR RBA Workshops

ITEM NAME	UNITS	RATE (USD)	TOTAL
Antiracist Results Based Accountability Workshop Series - 10 X ½ day virtual sessions (2 facilitators)	10	\$6,000	\$60,000
Travel - 3 trips in-person (2 facilitators)	6	\$1,500	\$9,000
Support & Coaching	35	\$225	\$7,875
Internal Project management support and prep	50	\$225	\$11,250
		Total	\$88,125

Phase 3: Train-the-Trainer

ITEM NAME	UNITS	RATE (USD)	TOTAL
AR RBA Train-the trainer 5 X ½ day virtual sessions (2 facilitators)	5	\$6,000	\$30,000
Integration/Braiding strategic planning thought partnership Sessions	2	\$6,000	\$12,000
		Total	\$42,000

Total

Phase 2: AR RBA Workshops	\$88,125
Phase 3: Train-the-Trainer	\$42,000
Contract Total	\$130,125

Appendix A: Facilitator's Biographies



Andrés Oswill (he/they, Latinx) is a seasoned organizational leader committed to providing the support and expertise to move this work forward. His experience spans government services, non-profit leadership, working with candidates and elected leadership, and serving on governing boards. As a young queer Latinx professional who's served in executive leadership, they have found their calling in working with people across the movement to sustain change at all levels within and outside organizations.

Born in Fremont, CA and raised in the East Bay, their work is very much shaped by their lived experience as the only child of a single mother who immigrated from Perú. As a queer cis male who is biracial (Latinx/white), his work is very much shaped by intersectionality and experience of othering. After growing up in the multicultural melting pot of the Bay, Andrés moved to Oregon in 2011 and has been working to create change here ever since.

Andrés has a BA in Politics and Women and Gender Studies from Willamette University, and a Master of Urban and Regional Planning from Portland State University. They've worked to develop renter protections and housing policy at the Portland Housing Bureau, before being hired as a Senior Policy Advisor for Portland City Commissioner Chloe Eudaly. In City Hall, he led policy development on housing, economic development, anti-displacement, homelessness, bridging the digital divide, and urban planning.

After leaving the City of Portland, Andrés joined Oregon Futures Lab and Color PAC as Chief of Staff. Oregon Futures Lab, a 501 (c)(4), and Color PAC work to run, recruit, and retain progressive BIPOC leaders in Oregon. As Chief of Staff, his role ranged from managing day to day operations to long range planning, coaching, and program development.

Nothing about us, without us.



Elodie Baquerot Lavery (she/her, white) is an experienced senior executive with a demonstrated history of working across the public, non-profit, philanthropic, and private sectors to design and implement large-scale change efforts in service of racial justice.

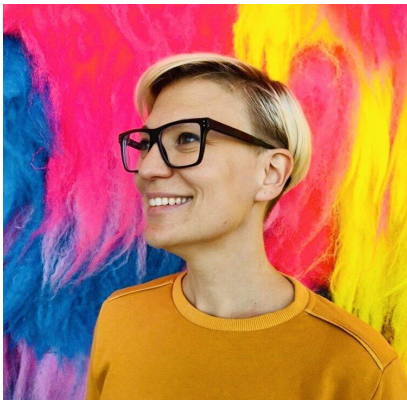
As the long-time Chief Operating Officer of two national non-profit organizations and a history of working in local and federal government, she has a deep and practiced understanding of what it takes - at the individual and institutional levels - to adaptively shape change from the inside-out. Much of her work falls at the intersection of antiracism and organizational

development. Throughout, she deploys her facilitation, coaching, strategic planning, and operational skill sets to support organizational change that centers humanity and drives meaningful impact.

Most recently, Elodie served as the Chief Operating Officer at Public Allies, a 29 year old national social justice organization committed to changing the face and practice of leadership by recruiting, training, and supporting talented young leaders, with a passion for social impact, to create meaningful change in their communities. Before that, she spent nine years as the COO of Living Cities; a leading racial economic justice organization focused on harnessing the collective power of 18 of the world's largest foundations and financial institutions and partnerships with localities across the country to close the racial income and wealth gaps in American cities. While there, Elodie managed the organization's transformation from 'start up' to maturity; overseeing the implementation of an innovative results-oriented approach, driving strategic engagement with the Board of Directors, and overseeing talent/HR, culture, and finances.

Prior to joining Living Cities, Elodie was a presidential appointee in the Obama Administration, where she served as a senior member of Secretary Shaun Donovan's Office at the U.S. Department of Housing and Urban Development. Previously, Elodie was a Housing Fellow at the New York City Department of Housing Preservation and Development. She has also worked as a Research Associate at Monash University and at the New York City Economic Development Corporation.

Elodie is a member of the Antiracist Ecosystem of practitioners who work together for greater antiracist impact and is a graduate of the University of Michigan (BA) and the London School of Economics (MSc). She lives in New York City with her husband and two children.



Erika Bernabei's (she/they, white) work connects intentions and impact, in solidarity with Black, Indigenous and communities of Color and our collective humanity. Through Equity & Results, Erika leads the strategic design and implementation of whole organization and collaborative work to achieve racially equitable results. Erika works with small and large organizations, collective impact initiatives and public agencies to use results-driven, racial equity principles to build capacity for impact.

Equity & Results uses antiracist principles, developed by the People's Institute, elders, scholars and organizers, to transform how systems work and strategically disrupt common practices and replace them with actions that address the root causes of the problem. Erika is an expert in Antiracist Results-Based Accountability (AR RBA), and has worked with groups locally and nationally to successfully use this tool.

Prior to E&R, Erika worked at PolicyLink for nearly a decade, co-leading the development of the Promise Neighborhoods Institute to support 50+ place-based partnerships to implement an impact-driven infrastructure and as an Assistant Commissioner in the New York City Department of Homeless Services. She has a MA in Education Policy from Teachers College, Columbia University and a PhD in Educational Leadership from New York University. Erika lives in New York State with her partner and dog, and loves people, getting out of town, food and music.