



SUMMARY REPORT

Agenda Date: 6/4/2024

To: Sonoma County Board of Supervisors, Board of Directors of the Sonoma County Water Agency, Board of Commissions of the Community Development Commission, and Board of Directors of the Sonoma County Agricultural Preservation and Open Space District

Department or Agency Name(s): Human Resources

Staff Name and Phone Number: Kristin Kelly (707) 565-3145

Vote Requirement: Majority

Supervisorial District(s): All

Title:

Organizational Development Consultants, Professional Development Trainers, and Racial Equity Consultants/Trainers

Recommended Action:

- A) Authorize the Human Resources Director to execute agreements with nineteen (19) Organizational Development Consultants, Professional Development Trainers, and Racial Equity Consultants/Trainers, effective July 1, 2024, through June 30, 2027, with an option to renew for two additional one-year terms at the discretion of the Director.

- B) Authorize the Human Resources Director to increase the spending cap of \$150,000 by no more than \$100,000 per contract year on any of the agreements, if necessary, during the term.

Executive Summary:

The requested Board action authorizes the Human Resources Director to execute agreements with nineteen (19) Organizational Development Consultants, Professional Development Trainers, and Racial Equity Consultants/Trainers for the period of July 1, 2024, through June 30, 2027. The contracts were selected through a competitive Request for Proposal (RFP) process in 2024. These firms can be utilized by Human Resources or by individual departments for organizational development or training needs, as reviewed and approved by Human Resources.

These agreements are all fee-for service contracts with no minimum amount of work guaranteed to any firm and service agreements are paid by the requesting department. Each contract has a maximum of \$150,000 per 12-month term, with the Human Resources Director having delegated authority to increase the spending cap by no more than \$100,000 per year, per agreement, if necessary to address demand and usage, during the term. Approving these contracts will allow for continuity of current services, support on-going department projects, and facilitate the development of new County-wide training programs in alignment with the County's Organizational Excellence strategic pillar.

Discussion:

Organizational Development Professionals Services Background:

The Human Resources Department (HR) is responsible for providing consultation and support to County departments and agencies on all employment-related matters including employee relations, organizational

development, and individual employee development. To accomplish this goal, an appropriate level of expertise is required in all areas. While HR successfully provides a wide variety of services, a resource gap exists in the areas of Organizational Development Services, which are supplemental to the core HR services already being provided.

The types of projects and services provided by the Organizational Development Consultants may include the following:

- Assessment, coaching, mentoring and support for supervisors and managers, including executive management, in areas such as interpersonal and other communication skills, leadership, emotional intelligence, fostering employee engagement, and other related areas as may be identified;
- Conflict resolution, mediation of interpersonal conflicts between employees, team building activities, and other group facilitation;
- Facilitation in the identification and development of strategic planning and change management initiatives; and
- Other organizational development work as needed.

The goal is to ensure an appropriate level of expertise and sufficient resources available to County departments and to provide an efficient and cost-effective process for individual departments to contract for these services. This goal will be met by establishing Organizational Development service agreements with a pool of pre-approved Organizational Development Consultants specializing in a variety of areas capable of providing services to County departments on HR's recommendation and approval as needs arise. Costs are borne by the individual requesting department under a Blanket Purchase Order (BPO) arrangement with prior approval from HR.

With the establishment of a pool of qualified Organizational Development Consultants and the BPO structure, HR is better able to advise County departments when it is determined these services are needed. HR Workforce Development has used this system successfully since the unit's re-establishment in 2013.

Training Professional Services Background:

The Human Resources Department (HR) through its Workforce Development Unit is responsible for providing training to all County departments and agencies. To continue to provide a robust Countywide training program, additional training resources are necessary to provide instruction in a variety of topics, augmenting those that exceed the capacity, level of expertise, or experience of in-house trainers. Training Professionals may specialize and provide instruction in one, some, or all of the training topics. Additionally, development of training curricula in various subjects for multiple modalities including live in-person, virtual and hybrid (both in person and virtual).

Training topics may include but are not limited to:

- Computer and analytic skills;
- Professional Development: Time management, work/life balance, professional writing, effective communication, public speaking, collaboration, team building, etc.;
- Interpersonal Skills: Emotional intelligence, self-awareness, mindfulness, wellness, decision making, interpersonal effectiveness, stress management, resilience, and related topics as may be appropriate;

- Customer Service: Customer service in public agencies, active listening, customer awareness and advocacy, de-escalation, difficult customers, providing excellent customer service in culturally diverse communities, ethics, etc.;
- Supervisory, Management, and Executive Development: Team building and development; effective meetings management; performance management; team dynamics; staff planning and effective hiring practices; change management; project management; defining and delegating tasks; leadership skills; strategic planning; innovative and critical thinking; process improvement, etc.; and
- Performance and Personal Effectiveness: Coaching, mentoring, collaborative decision making, building consensus, fostering, and changing cultures and environments.

The goal is to ensure an appropriate level of expertise and the broadest training curricula are made available to County employees in the most efficient and cost-effective manner. There is a need to allow departments to easily contract and obtain training services for intact team trainings when deemed appropriate with the prior approval of HR. This goal will be met by establishing Training Professional service agreements with a pool of pre-approved Training Professionals specializing in a variety of areas capable of providing training services to HR-Workforce Development as well as to individual County departments on HR's recommendation and approval.

To ensure an appropriate level of expertise, and to provide an efficient and cost-effective process to contract for these services, staff recommends the establishment of service agreements with a pool of pre-approved Training Professionals capable of providing a variety of courses. Costs are borne by the individual requesting department under a Blanket Purchase Order (BPO) arrangement with prior approval from HR.

HR Workforce Development has used this system successfully since the unit's re-establishment in 2013.

Racial Equity Consultants and Training Professionals Services Background:

The Human Resources Department (HR) through its Workforce Development Unit is charged with supplementing Countywide race equity training that is being provided by the Office of Equity, and providing tools and learning opportunities for departments and employees working towards achieving racial equity in County service provision and ensuring the County workforce is reflective of the community we serve. To that end, HR has identified a need for Racial Equity Consultants and Training Professionals to support both the work of the Workforce Development Unit as well as other departments who are at various stages of evaluating and implementing race equity initiatives. Of the nineteen (19) consultants who are being recommended for contract awards today, eight (8) have experience providing racial equity consulting and training in the following areas:

- Team building and group facilitation focused on improving the abilities of employees at all levels to communicate and work together more respectfully and productively;
- Coaching/mentoring employees, supervisors, and managers on specific practices that promote inclusiveness and belonging;
- Conflict resolution, mediation of interpersonal conflicts between employees of differing backgrounds;
- Equity-centered assessments of current internal organizational policies, procedures, and processes to identify any areas that may be barriers to an equitable workplace and provide detailed recommendations for necessary improvements;
- Assistance in developing methods for evaluating progress and areas for continued growth in alignment with the intended impact of Countywide Racial Equity initiatives;

- Data gathering and analysis of input from County employees and constituents related to their training in the areas of diversity, equity, inclusion, and belonging; and
- Design, develop, and present anti-racism model curriculum centered on training of County leadership and employees.

The goal is to ensure an appropriate level of expertise and sufficient resources available to County departments and to provide an efficient and cost-effective process for individual departments to contract for these services. This goal will be met by establishing Racial Equity Consultants and Training Professionals service agreements with a pool of pre-approved Racial Equity Consultants and Training Professionals specializing in a variety of areas capable of providing services to County departments on HR's recommendation and approval as needs arise. Costs are borne by the individual requesting department under a Blanket Purchase Order (BPO) arrangement with prior approval from HR.

With the establishment of a pool of qualified Racial Equity Consultants and Training Professionals and the BPO structure, HR is better able to advise County departments when it is determined these services are needed.

Request for Proposals (RFP) and Selection Process:

The goal of this RFP was to establish service agreements for Organizational Development Consultants, Professional Development Trainers, and Racial Equity Consultants/Trainers.

A vetted pool of consultants and trainers who specialize in a variety of areas will provide essential organizational workforce development to County departments based upon Human Resources Department recommendation and approval. An RFP was issued on February 9, 2024.

The RFP was posted to the Sonoma County Purchasing Supplier Portal, and event invitations sent to nearly 708 suppliers. An additional 2,072 notifications were sent to subscribers of the RFP/Q posting list. Thirty-two (32) proposals were received, and a comprehensive evaluation was conducted involving individuals with training, organizational development, and racial equity experience from both Human Resources and the Office of Equity.

As a result of the selection process, HR recommends the County execute agreements, administered by the Human Resources Department with the following nineteen (19) vendors that were evaluated to be the best qualified to meet the anticipated training needs of the County:

- Aimee Reedy
- BeWell Network, LLC
- BJ Bischoff
- California Indian Museum & Cultural Center
- CPS HR Consulting
- Dalberg Consulting-US LLC
- DEI Works, LLC
- Delia and Associates
- Guidehouse, LLP
- Leap Solutions
- Mission Consulting LLC
- Municipal Resource Group LLC
- Praxis Human Systems
- Sundari Kumar (BeTheChange)

- The Consulting Team
- The Justice Collective
- The Personnel Perspective
- ThinkDev, LLC
- Tiangay Kemokai

Organizational Development fees range from \$175 to \$700 per hour. Training fees range from \$1,400 to \$9,500 per class depending on the length, level of expertise of the individual provider, and the area of specialty. Racial Equity Consultants fees range from \$250 to \$450 per hour. Racial Equity Training Professionals fees range from \$1,000 to \$10,000 per class depending on the length, level of expertise of the individual provider, and the area of specialty. More extensive Racial Equity work has been quoted by Racial Equity Consultants and Trainers in the range of \$5,000 to \$100,000, depending on the scope of the program or project.

The agreements are designed to provide maximum flexibility for each vendor and to permit HR to refer vendors to individual departments for organizational development or for intact-team training to be paid from departmental budgets. These agreements are all fee-for-service contracts with no minimum amount of work guaranteed to any firm.

Strategic Plan:

This item directly supports the County's Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

Pillar: Organizational Excellence

Goal: Goal 3: Become an employer of choice with a diverse workforce that reflects our community, and an employer with a positive work culture that builds engaged and developed employees.

Objective: Objective 3: Support employee professional growth and retention by investing in high quality training, development, and leadership programs.

Workforce Development is tasked with developing the overall training programs for the County's almost 4,500 employees, including training delivery; management of training vendors and organizational development consultants; administration of learning management system (LMS); and evaluation of the County's training program with an equity lens. Key competencies have been identified that are relevant to all County positions and organized under the five core values the County identified in the Strategic Plan (Equity, Excellence, Innovation, Collaboration, and Accountability). Curriculum and trainings were then identified and developed around the key competencies and applied through a FOUR-TIER SYSTEM - Tier 1: New Employee; Tier 2: Individual Contributor; Tier 3: Emerging Leader, and Tier 4: Executive. Workforce Development's FOUR-TIER SYSTEM guides employees in their training participation and advancement goals within the County.

Racial Equity:

Was this item identified as an opportunity to apply the Racial Equity Toolkit?

No

Prior Board Actions:

2/28/2023: Amendment to Agreement for Organizational Development Consultant

8/9/2022: Amendment to Agreement for Organizational Development Consultant

6/11/2018: Authorized HR Director to execute agreements with 23 firms for Workforce Development services

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effective July 1, 2018, through June 20, 2021, with an option to renew for two additional one-year terms at the discretion of the HR Director. Authorized the HR Director to increase the spending cap of \$150,000 by no more than \$100,000 per fiscal year on any of the agreements if necessary, during the term

FISCAL SUMMARY

Expenditures	FY23-24 Adopted	FY24-25 Projected	FY25-26 Projected
Budgeted Expenses		\$156,000	\$156,000
Additional Appropriation Requested			
Total Expenditures		\$156,000	\$156,000
Funding Sources			
General Fund/WA GF		\$156,000	\$156,000
State/Federal			
Fees/Other			
Use of Fund Balance			
General Fund Contingencies			
Total Sources		\$156,000	\$156,000

Narrative Explanation of Fiscal Impacts:

The agreements are all fee for service agreements. Human Resources has an annual budget of \$156,000 for County-wide workforce development training which will be utilized for these vendors services.

Other departments using these agreements determine their ability to pay for services based on their existing budgets and are billed directly by vendors.

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)

Narrative Explanation of Staffing Impacts (If Required):

N/A

Attachments:

Agreements

Related Items "On File" with the Clerk of the Board:

N/A