



## SUMMARY REPORT

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**Agenda Date:** 6/8/2021

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**To:** Board of Supervisors

**Department or Agency Name(s):** Office of Equity, Human Services Department, Human Resources Department

**Staff Name and Phone Number:** Alegría De La Cruz, 707-565-8980; Angela Struckmann, 707-565-6990; Christina Cramer, 707-565-2988

**Vote Requirement:** Majority

**Supervisorial District(s):** Countywide

**Title:**

Professional Services Agreement with Equity & Results, LLC, to provide consulting services in the development of Racial Equity Learning Program, equity metrics, and resulting action plans.

**Recommended Action:**

Delegate Authority to the Director of the Office of Equity to execute a Professional Services Agreement with Equity & Results, LLC, for consulting services for 3 years at \$391,900.

**Executive Summary:**

It is the vision and charge of the Office of Equity that all staff and leadership share a common understanding and language for the concepts of individual, institutional, and structural racism and implicit and explicit bias, and can develop, see, and understand their roles and responsibilities in the County's racial equity action plan (s). We can achieve that vision by taking critical and deliberate steps to develop our organizational capacity through the development and delivery of a Racial Equity Learning Program, led by the County's Equity Core Team. The Core Team is a cross-departmental leadership team made up of over 70 County employees currently representing 25 out of 26 departments. Core Team members will support the Office of Equity in designing, coordinating, and launching racial equity initiatives across the organization by receiving resources and training from the Office of Equity, and contractors, to lead the implementation of equitable practices and processes in each of their departments. Creating this additional and needed organizational capacity sets the underlying foundation to drive the development and implementation of clear equity action plans and accountability measures.

The current 3 positions in the Office of Equity are dedicated to this important work, but they cannot carry this work alone. With investment in and support to staff and leaders throughout the entire County body, we can achieve meaningful change and racial equity in County representation, service delivery, and employment opportunities.

The Office of Equity recommends entering into a contract with Equity & Results, LLC for a Racial Equity Learning Program and to apply a Results Based Accountability model to track internal and external progress in addressing disproportionate outcomes using a set of specific indicators and metrics. Equity & Results uses antiracist principles to transform how systems work and strategically disrupt common practices that perpetuate inequities and replace them with actions that address the root causes of the problem and lead to

improved outcomes, beginning training and facilitation support and resulting in a Racial Equity Action Plan. Erika Bernabei and Theo Miller, co-founders and directors, are experts in RBA and have worked with groups nationally and internationally to successfully use this tool. The contract amount is for up to a total of \$391,900 for three years, with a lump sum amount to be paid on a quarterly basis for work to be performed on behalf of the Office of Equity. The contract will include prices for services for other County departments to be able to direct work to be performed on their behalf, which additional work would be approvable via separate task order, consistent with that department's budget and approval process, and separately from the Office of Equity contract amount.

During the FY 2021-22 Budget Workshops, your Board allocated \$100,000 from General Fund savings to the Office of Equity for the Racial Equity Learning Program for FY 2020-21. \$352,300 of contract costs is funded with the Office's annual General Fund Net Cost. In FY 2021-22, \$168,000 is included in the Recommended Budget and \$84,300 will be included in FY 2022-23's Recommended Budget for this purpose. Additional appropriations will be added during consolidated budget adjustments for the FY 2021-22 Budget in the amount of \$39,600 and will be funded through a collaboration with the Human Services Department.

**Discussion:**

The County issued a Request for Qualifications for Race and Social Equity Consulting on January 5, 2021. The County received 13 qualified responses, and after reviewing the submitted materials and conducting research into the proposed methodologies to be utilized, the Office of Equity and the Human Services Department determined that Equity & Results provides the best pathway to achieving the County's racial equity goals. Equity & Results uses antiracist principles to transform how systems work and strategically disrupt common practices that perpetuate inequities and replace them with actions that address the root causes of the problem and lead to improved outcomes. Equity & Results explains: "[i]t is very common that groups do not know how to bridge the gap between a commitment to racial equity and their day-to-day work. But when an organization with a deep understanding of racial equity through personal and institutional education and training uses a results-driven methodology, the group moves from good intentions to transformation."

Equity & Results is uniquely qualified to support the County in developing a Racial Equity Learning Program and to apply a Results Based Accountability model to track internal and external progress in addressing disproportionate outcomes using a set of specific indicators and metrics. The County intends to utilize the Results Based Accountability (RBA) model to facilitate the normalization of conversations around race, to enhance staff capacity through ongoing training, and to operationalize racial equity by embedding this lens into routine decision-making and policy implementation. Equity & Results will assist the Office of Equity in two critical phases of the County's equity work: Phase 1: the Racial Equity Learning Program, and Phase 2: Racially Equitable Impact through Antiracist RBA. The proposed contract reflects these two phases of work, with Phase 1 (\$268,000) beginning upon contract execution, and Phase 2 (\$39,600 in FY 21-22 and \$84,300 in FY 22-23) beginning in January, 2022.

The proposed Learning Program will develop racial equity skills and competencies, beginning first with the County's equity Core Team, including the Upstream Investments staff in the Human Services Department. Equity & Results key milestones in Phase 1 will include the creation and delivery of a racial equity foundational

training for Core Team members and the development of a train-the-trainer and facilitation lab to build the knowledge and capacity of these Core Team members to support their departments. Equity & Results will then work with the Core Team to develop and deliver the second round of trainings to the Board of Supervisors, all department heads, and the Policy Committee of Upstream Investments. These two areas of focus for training - Core Team members and policy makers - will equip our leaders and staff with the knowledge and understanding of racial equity history, dynamics, and challenges setting the foundation for Phase 2.

At this point, the Office of Equity and Human Resources will work collaboratively to ensure a countywide Racial Equity Learning Program is available for all County staff, using the Learning Management System (LMS) as needed to assign, deliver, and track progress on learning for all County employees.

Following the beginning of the implementation of the Countywide Racial Equity Learning Program, the consultant will undertake Phase 2, application of the Results Based Accountability model to the County's equity work. RBA is founded on evidence-based processes and tools to establish and develop actions that result in racially equitable results. Sonoma County's [Upstream Investments](http://upstreaminvestments.org/) team has identified RBA as its preferred approach to operationalize the Board-approved Contracting Principles. Upstream Investments is a Policy Initiative chartered by the Sonoma County Board of Supervisors to advance evidence-informed prevention focused practices across the County. By looking at key indicators and disaggregating our local data, we are able to see the inequities in our systems and programs and find focused interventions to prevent and correct them, hence enhancing the County's racial equity work.

Currently, Human Services is coordinating with the safety net Departments to utilize RBA for the planning, reporting, and monitoring of performance measures of County programs and contracts. An online dashboard has been developed to inform the Board about program performance and successes. Utilizing a RBA approach to support the County's racial equity work builds on the expertise and deep work between our safety net departments and our community-based partners who are also implementing RBA.

Specifically, the consultant will develop a RBA structure to assess the existing baseline, measure future progress, and evaluate the effectiveness of the racial equity action plan. As the County's "brain" in data tracking and evidence-based solutions, the Upstream Investment team will receive additional and focused training from Equity + Results, which will enable them to lead their department, and the County, in centering equity in our RBA efforts. RBA has the potential to deepen how the County directs its investments, implements programs, and supports County employees. By linking the County's RBA efforts and adding equity lens, we will be able to assess and recommend decisions based on data to support equitable outcomes across programs. Erika Bernabei and Theo Miller, co-founders and directors, are experts in RBA and have worked with groups nationally and internationally to successfully use this tool. Their clients include the City of Portland and the Seattle Office for Civil Rights, which are two of the most prominent and longest-established government leaders in racial equity work.

There are additional opportunities for individual departments to utilize Equity & Results' trainers and facilitators through a Task Order, to request, and pay for, the support of Equity and Results' trainers and

facilitators to advance this work within each agency while still aligning to the overarching countywide plan. When it comes to racial equity work, County departments are at different stages; some departments have had “diversity, equity and inclusion” working groups for years, while others are just starting this work. This will ensure that departments have specific supports to align with our shared work. To meet these goals, the Office of Equity is requesting the delegation of authority to its Director to execute a Professional Services Agreement with Equity & Results, LLC, for consulting services for 3 years in an amount not to exceed \$391,900, in a form approved by County Counsel.

**Prior Board Actions:**

None.

**FISCAL SUMMARY**

| <b>Expenditures</b>                | <b>FY 20-21<br/>Adopted</b> | <b>FY21-22<br/>Projected</b> | <b>FY 22-23<br/>Projected</b> |
|------------------------------------|-----------------------------|------------------------------|-------------------------------|
| Budgeted Expenses                  | 100,000                     | 168,000                      | 84,300                        |
| Additional Appropriation Requested |                             | 39,600                       |                               |
| <b>Total Expenditures</b>          | <b>100,000</b>              | <b>207,600</b>               | <b>84,300</b>                 |
| <b>Funding Sources</b>             |                             |                              |                               |
| General Fund/WA GF                 | 100,000                     | 168,000                      | 84,300                        |
| State/Federal                      |                             |                              |                               |
| Fees/Other                         |                             |                              |                               |
| Use of Fund Balance                |                             |                              |                               |
| Contingencies                      |                             | 39,600                       |                               |
| <b>Total Sources</b>               | <b>100,000</b>              | <b>207,600</b>               | <b>84,300</b>                 |

**Narrative Explanation of Fiscal Impacts:**

During the FY 2021-22 Budget Workshops, your Board allocated \$100,000 from General Fund savings to the Office of Equity for the Racial Equity Learning Program for FY 2020-21.

In FY 2021-22, \$168,000 is included in the Recommended Budget for this program. Additional appropriations will be added during consolidated budget adjustments for the FY 2021-22 Budget in the amount of \$39,600 and will be funded through a collaboration with the Human Services Department. \$84,300 in contract costs for FY 2022-23 will be included in the recommended budget that year.

| <b>Staffing Impacts:</b>                       |  |                               |                               |
|--|--|-------------------------------|-------------------------------|
| <b>Position Title (Payroll Classification)</b> | <b>Monthly Salary Range<br/>(A-I Step)</b> | <b>Additions<br/>(Number)</b> | <b>Deletions<br/>(Number)</b> |
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**Narrative Explanation of Staffing Impacts (If Required):**

None.

**Attachments:**

None

**Related Items “On File” with the Clerk of the Board:**

None