



# Catholic Charities of Santa Clara County

**Catholic Charities of Santa Clara County (CCSCC) is soliciting:**

**SOLICITATION TYPE:** REQUEST FOR PROPOSAL

**RFP NUMBER:** CCSCC-LPR0325

**DESCRIPTION:** Consultation Services for Organization Cultural Assessment

**ISSUE DATE:** March 25, 2022

**RESPONSE DUE DATE:** **April 15, 2022**

**RESPONSE DUE TIME:** **5:00 PM PST**

**MAIL OR EMAIL RESPONSE TO:** Jennifer Long, Director of Compliance and QA  
Catholic Charities of Santa Clara County  
2625 Zanker Rd. Ste. 200  
San Jose, CA 95134  
**Email:** [jlong@catholiccharitiesscc.org](mailto:jlong@catholiccharitiesscc.org)

**DIRECT INQUIRIES TO:** Jennifer Long, Director of Compliance and QA  
**Email:** [jlong@catholiccharitiesscc.org](mailto:jlong@catholiccharitiesscc.org)

**All Responses are subject to the Conditions, Instructions and  
the Specifications attached hereto.**

**Late submissions will not be accepted.**

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## REQUEST FOR PROPOSAL FOR Organization Cultural Assessment

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### SECTION I. PURPOSE

Catholic Charities of Santa Clara County (CCSCC) is one of the largest and most comprehensive social service organizations in Santa Clara County, offering a wide range of services to people of all cultures and beliefs. There are six service divisions (Behavioral Health, Emergency Programming & Housing Services, Economic Development Services, Refugee Foster Care, Children Family Youth Development, and Advocacy & Community Engagement) within the Agency and they operate differently from and virtually independent of one another with their own processes and procedures. CCSCC's Long Range Plan consists of a visionary transformative new way of supporting our clients. We aim to leverage the strength of having such a wide breadth of services to provide holistic, wraparound support which we believe will be a more effective way to help clients rise up from and stay out of poverty—the primary mission-related “outcome” measure in our long range plan. This new way of working with clients will involve moving away from the long-established siloed operations amongst our various programs and toward collaboration and standardization of key processes across the agency. This will also include developing shared vision, goals and understanding throughout the service divisions and the administrative functions of the organization.

In order to achieve this ambitious goal of transforming the way we serve our neighbors in need, the agency itself must undergo a transformation. CCSCC's goal is to begin the process of changing the agency culture by first understanding the status quo. The agency seeks a qualified vendor to review and assess the current organizational culture with an aim to classify, describe and document the current culture and subcultures, identify areas of strengths and barriers to integration of services and systems and to provide recommendations for prospective action to start shifting our culture to one that better fosters collaboration, open communication, and learning.

CCSCC anticipates having the vendor start services in May 2022.

### SECTION II. DEADLINE AND SUBMITTAL INSTRUCTIONS

**Response due date and time:** Those interested in being considered as a vendor for the services described in this RFP must submit all required information, including cost, by 5pm PST on April 15, 2022 via email submission is preferred.

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### Please submit responses to:

Jennifer Long, Director of Compliance and QA  
[jlong@catholiccharitiesscc.org](mailto:jlong@catholiccharitiesscc.org)  
Catholic Charities of Santa Clara County  
2625 Zanker Rd. Ste. 200  
San Jose, CA 95134

### SECTION III. RFP SCHEDULE OF EVENTS

The following is the schedule pertaining to the RFP process.

- RFP release date: March 25, 2022
- Deadline for applicants to submit questions: April 4, 2022 by 5pm
- CCSCC responses to questions: April 7, 2022 by 5pm
- Proposals due: April 15, 2022 by 5pm
- Proposal evaluation completed: April 25, 2022
- Interview of selected vendors: May 2, 2022 - May 6, 2022
- Final decision: May 16, 2022
- Contract begins: May 2022

### SECTION IV. QUESTIONS PRIOR TO SUBMISSION

Questions regarding this RFP may be addressed to Jennifer Long via the email address provided in Section II of this document. The deadline for submitting questions is 5pm on April 4, 2022. All questions will be answered by 5pm April 7, 2022. Answers will be posted on the CCSCC website at <https://www.catholiccharitiesscc.org> and/or answered via an email to all applicants.

### SECTION V. EVALUATION PROCESS

The vendor(s) will be selected by an evaluation committee convened by CCSCC using the scoring method described in Section XIII, Evaluation Criteria.

### SECTION VI. CONTRACT PERIOD

The term of any contract resulting from this RFP shall be 3 months, beginning in May 2022. The contract may be extended by mutual agreement between vendor and client.

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### SECTION VII. ORGANIZATIONAL BACKGROUND

Since 1955, Catholic Charities of Santa Clara County (CCSCC), a San José-based non-profit organization, has provided innovative services and programs in Santa Clara County advocating for families and individuals in need, especially those living in poverty. The agency works to create a more just and compassionate community in which people of all cultures and beliefs can participate and prosper. Our clients range in age from young children, youth and teens to adults and older adults, most coming from low-income households struggling to meet basic needs. CCSCC offers a full continuum of wraparound programs and services, including: housing programs; disaster recovery services; mental health services for children and adults; immigration legal assistance; refugee foster care; job skills training and placement; after-school expanded learning; child, youth, and family programs; and programming for older adults, such as, wellness services, mental health services, multi-service senior centers, senior nutrition, and Long-Term Care Ombudsman programs. Major agency focus areas include integrated services, individual and family wellness, and pathways to self-sufficiency. Focus areas seek to become exemplars of the desired culture—one which increases the emphasis on learning and accountability for outcomes.

CCSCC currently employs approximately 450 full- and part-time and casual employees. Its footprint spans across the entire Santa Clara County with worksites as far north as Mountain View, reaching as far south as Gilroy. The agency comprises 90+ programs that support individuals and families of all ages in the County's under-served communities. Historically these programs or conglomerates of programs that make up the service division have functioned as stand-alone operations without much interactivity across service lines.

The staffing makeup includes several generations, from those still in college to those getting ready for retirement; varying levels of education (high school level to doctorates); diverse cultural and socio-economic backgrounds which enriches the ability of the agency to engage with the community and provide culturally competent services to its clients.

CCSCC's long range plan for the next 3 years is to develop a *replicable family-centered community change approach that will demonstrably move families out of deep poverty*. The project is called Footsteps: Pathways to Self-Sufficiency, a visionary approach to disrupting poverty through a family-centered community change initiative. CCSCC created four workgroups to implement this goal: (1) Gilroy, (2) Development, (3) Data, Technology & Systems, and (4) World Class Learning Organization.

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- (1) *Footsteps Initiative: Gilroy* - Initiative to provide integrated wraparound services & resources to Gilroy community to disrupt poverty
- (2) *Development* - Promoting Footsteps with funders to secure capital investment and sustainable funding
- (3) *Data, Technology & Systems* - Learning from Footsteps on how digital transformation can help disrupt poverty through technology, data and evaluation systems.
- (4) *World Class Learning Organization (WCLO)* - Learning from Footsteps to change agency culture through investment in professional development and breaking silos through new organizational routines and process mechanisms

The World-Class Learning Organization (WCLO) workgroup will support CCSCC's goal by providing systems, methods and opportunities to inform and enhance the experience for staff and clients in this transformation process. The goal is to set the stage for the Agency to move towards integration (standardized, integrated systems/processes); learning (value of data and making data-informed decisions); inclusion and openness to innovation. To advance the work of the WCLO group, CCSCC is looking for a vendor to review and assess the Agency's current culture.

### SECTION IX. SCOPE OF SERVICES

CCSCC seeks a vendor with a demonstrated capacity, experience, and expertise in conducting an organization cultural assessment for the purpose of obtaining an in-depth understanding of the existing culture (strengths and opportunities for improvement) and to provide recommendations for prospective actions to start breaking down silos and move toward service and systems integration—with an increased focus on outcomes related to *lifting people out of poverty*.

The vendor should endeavor to engage this assessment in the following ways:

#### *Defining the objective*

The vendor must as a first step meet with the WCLO workgroup and CCSCC's leadership to gain an understanding of the current processes and discuss the desired goals and objectives for the Agency. These conversations will then result in a definitive list of objectives for the cultural assessment.

#### *Employee engagement*

It is the agency's intent that this assessment be as inclusive of all employees as practicable. The vendor should employ practices aimed to reach a diverse group of subjects, taking into account variances in technological skills, access to certain communication tools and systems, level of education and language barriers.

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### *Surveys and assessments*

The vendor must conduct quantitative assessments to measure various components of and factors that impact organization's culture. The selected vendor is required to compile both quantitative and qualitative data pertaining to the agency's organizational culture. The assessment tools are to reflect the prevailing best practices in the field of organizational cultural assessment. The final report should include statistical or data/analytic information as well as an overview of collected insights and comments from staff at all levels across the organization.

### *Findings/Recommendations*

The final work product will be a report prepared for the WCLO workgroup that details the findings of the cultural assessment and provides recommendations for meeting the objectives defined at the beginning of the assessment process.

## **SECTION X. APPLICANT ELIGIBILITY CRITERIA**

In order to apply, applicants must meet the following minimum eligibility requirements:

- Must hold a current City of San Jose Business Tax Certificate (business license) or have applied for one before the commencement of services
- Applicants must demonstrate that they have been in business for a minimum of three (3) years
- Applicants must demonstrate that they have been performing services similar to those requested in this RFP for a minimum of three (3) years
- Applicants must demonstrate that they maintain adequate insurance coverage as described in Section XIV- 7.

## **SECTION XI. PROPOSAL REQUIREMENTS**

- Eligible bidders must provide a complete response to this RFP and submit it according to the timeline and procedures described in Section II.
- Applicants may submit no more than one (1) proposal in response to this RFP.
- Proposals shall be signed by an authorized representative of the proposer on the Cover Sheet (Appendix A).
- All information requested must be submitted with the proposal. Failure to submit all information requested may result in the organization requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected.
- Proposals should respond to all questions and requests for information as thoroughly as possible with concise descriptions of how the proposal meets the requirements. This will allow CCSCC to properly evaluate the applicant's capability to provide the requested services.
- Terms detailed in the submitted proposal shall remain firm for 120 days from the bid opening date.

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**SECTION XII. PREPARING A RESPONSE**

**A. Proposal format**

- Please use a standard 12 point font such as Times New Roman or Arial in preparing the response. Handwritten proposals will not be accepted.
- Proposals shall be single-spaced.
- All pages of the proposal shall be numbered
- Proposers shall respond to the RFP items in the order that they are delineated in Section XII - B
- All submissions must be provided electronically via email to the contact described in Section II of this RFP. Please submit one document containing all requested information in pdf format.

**B. Proposals must be prepared as follows, in the order listed:**

1. Cover sheet signed by an authorized agency representative (Attachment A)
2. Narrative – Please prepare a narrative of no more than 6 pages that succinctly responds to the following:
  - i. Company background: Include an organization description with organizational structure, business structure, year founded, mission or overall company goals, location of headquarters, number of employees, and major programs and services. *(1 page maximum)*
  - ii. Qualifications and experience: Applicants must describe their qualifications and experience in delivering the services requested by this RFP, or similar services. Applicants must include the number of years they have been providing such services, industries of past clientele, and a description of the reasons they are qualified to fulfill the RFP requirements. Please also include a brief summary of similar contracts or projects fulfilled over the past three years recently completed and briefly describe how your company was successful in meeting the deliverables. *(2 pages maximum)*
  - iii. Staffing: Describe the personnel who will be involved in performing the services, including their relevant experience, training, and other qualifications *(1 page maximum)*
  - iv. Methodologies: Applicants must describe the methods and tools they will use for this project and any best practices. *(1 page maximum)*
  - v. Workplan: Provide a detailed and comprehensive description of how the vendor intends to provide the services requested in this RFP. This description shall include, but not be limited to: how the project(s) will be managed and scheduled, how and when data and materials will be delivered to the CCSCC, communication and coordination, the working relationship between the vendor and client's staff, and the company's general philosophy in regards to providing the requested services. *(1 page maximum)*

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3. Cost proposal: Applicants must include a cost proposal to include hourly rates (if applicable) and it should highlight the key staff, including their names, tasks, and any other positions that would likely be involved in this project.
4. Required Attachments
  - Proof that applicant has applied for a City of San Jose Business Tax Certificate, or statement affirming the applicant will have applied for a Business Tax Certificate prior to the start of services. Vendors choosing the last option must provide the Certificate or proof of application before the contract start date.
  - Copy of current certificate of insurance evidencing the coverage required by this RFP
  - Using Attachment B, applicants are to list three client references for whom they have provided similar services.

### SECTION XIII. EVALUATION CRITERIA AND SCORING

All proposals will undergo an evaluation process conducted by a qualified evaluation committee convened by CCSCC.

Proposals will first be reviewed on Professional Qualifications, past involvement with similar projects, proposed work plan and fee proposal.

The committee then will schedule interviews with the selected firms if necessary. Then selected firms will be given the opportunity to discuss in more detail their qualifications, past experience, proposed work plan and fee proposal.

The interview must include the project team members expected to complete a majority of work on the project. The interview shall consist of a presentation of up to thirty minutes (or the length provided by the committee) by the offeror, including the person who will be the project manager on this contract, followed by approximately thirty minutes of questions and answers. Audiovisual aids may be used during the oral interviews.

The firms interviewed will then be re-evaluated by the above criteria, and adjustments to scoring will be made as appropriate. After evaluation of the proposals, further negotiation with the selected firm may be pursued leading to the award of a contract by CCSCC, if suitable proposals are received.

CCSCC reserves the right to waive the interview process and evaluate the offerors based on their proposals and fee schedules alone and open fee schedules before or prior to interviews.

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CCSCC will determine whether the final scope of the project to be negotiated will be entirely as described in this RFP, a portion of the scope, or a revised scope.

Work to be done under this contract is generally described through the detailed specifications and must be completed fully in accordance with the contract documents.

Any proposal that does not conform fully to these instructions may be rejected.

### SCORING

All proposals will undergo a four phase review process conducted by a qualified evaluation committee convened by CCSCC:

Phase I: Proposals will first be reviewed to ensure they meet the applicant eligibility requirements and instructions on preparing and submitting the proposal. This review will be done on a Pass/Fail basis. If a proposal is missing a required document or information, CCSCC, at its discretion, may ask the applicant to provide the information within a designated timeframe so that the proposal may move forward in the evaluation process. CCSCC has the right to waive any technical deficiency.

Phase II: Proposals that receive a passing score in the first evaluation phase will then be scored as follows, with a maximum of 100 points available:

- Qualifications and experience: The proposer's past experience and performance on comparable engagements and the proposed staffing plan and relevant qualifications of staff: maximum of 45 points\*
  - Qualification of vendor: maximum of 25
  - Qualification of vendor on project team: maximum of 20 points
  - \*5 additional bonus points may be awarded if vendor is considered a Minority Business Enterprise, Small Business or Women-Owned Business.
- Methodologies and workplan: methods and tools to be used and extent to which the work plan meets project goals: maximum of 40 points
- Reasonableness of cost: maximum of 15 points

Phase III: Proposals receiving a score of 75 and above from Phase II will be placed on a “short list” and will proceed to the interview phase of the evaluation process.

Phase IV: CCSCC may direct negotiations with the highest ranked proposer, negotiations with multiple proposers, and/or may request for best and final offers.

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### SECTION XIV. GENERAL TERMS AND CONDITIONS

1. In submitting a proposal, applicant agrees that it has procured, and shall maintain, all permits, certifications, and licenses required to conduct its business lawfully and that it shall remain informed of and in compliance with all federal and local laws, ordinances and regulations that affect fulfillment of the contract.
2. Vendors must comply with all applicable federal, state, and local wage and hour laws. Applicable laws may include, but are not limited to, the Federal Fair Labor Standards Act, the California Labor Code, and any local Minimum Wage Ordinance or Living Wage Ordinance.
3. Where any vendor CCSCC utilized to perform work under the Agreement has been found in violation of any applicable wage and hour law by a final judgment, decision, or order of a court or government agency, CCSCC reserves the right to withhold payment to the vendor until such judgment, decision, or order has been satisfied in full.
4. Any costs incurred in preparing a proposal in response to this RFP shall be the proposer's sole responsibility.
5. Any agreement resulting from this RFP shall be subject to but not limited to the following certifications: a. Certification that it nor its principles are not debarred, suspended, proposed debarment, declared ineligible, or voluntarily excluded by any federal department or agency from participation in this transaction by any Federal department or agency in accordance with 45 CFR Part 76. b. Certification Regarding Lobbying under Title 31, US Code, Section 1352.
6. Invoicing and Payment Terms: vendors shall invoice CCSCC by the 10th day of the following month for services rendered.
7. Insurance: Proposer shall, at all times, at its own expense, obtain and carry insurance coverage as follows:

*General liability*

- Comprehensive general insurance with limits not less than \$1 million per occurrence and \$2 million aggregate.

*Auto liability (if applicable)*

- Primary auto liability with limits not less than \$1 million per occurrence covering specific vehicles to be brought onto the facility.

*Workers' compensation insurance*

- Coverage A statutory limits for the state of California.
- Coverage B employer's liability coverage in limits not less than:
  - o \$500,000 each accident for bodily injury by accident.
  - o \$500,000 policy limit for bodily injury by disease.
  - o \$500,000 each employee for bodily injury by disease.

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The evidence of insurance shall be provided on an Acord Form 27 (or other form acceptable to CCSCC). All such policies shall name Catholic Charities of Santa Clara County as Additional Insured and must provide endorsement evidencing such additional insured status as well as language indicating that the insurance policies evidenced shall be deemed primary to any other insurance policies available to CCSCC as non-contributory and shall include an endorsement referencing same. Said endorsement will also include language that the insurer waives its rights of subrogation or otherwise against the CCSCC. Said endorsement shall also indicate that a 30-day written notice of cancellation or material change to any of the coverage evidenced in the certificate will be provided to CCSCC.

Evidence of insurance shall be forwarded to the following address and must be received at least ten days prior to the start of work:

Catholic Charities of Santa Clara County  
Insurance & Risk Management  
2625 Zanker Road, Suite 200  
San Jose, CA 95134

Addendum: In the event that it becomes necessary to revise this RFP, CCSCC will provide an addendum on its website and via email.

8. Proposers may submit no more than one (1) proposal in response to this RFP. The proposal shall be completed and signed by an individual authorized to bind the firm submitting the proposal.
9. Withdrawal of Proposals: At any time prior to the hour and date set for submitting proposals, a proposer may withdraw the proposal. This will not preclude the submission of another proposal prior to the hour and date set for submission. After the scheduled time and date for submitting proposals, no proposer will be permitted to withdraw the bid unless the award is delayed for a period exceeding 60 days.
10. By submitting a proposal, the proposer represents that:
  - They have read and understand the purpose and requirements of the RFP.
  - The proposer possesses the capabilities, equipment, and personnel necessary to provide an efficient and successful service.
  - The proposer has all required licenses/certifications and insurance.
11. Receipt of Proposals: Proposers are responsible for delivering their bid on time and in accordance with RFP requirements. Only those bids that are received by the designated date and time will be reviewed. Those proposals received after the date and hour designated will be disqualified. Late bids will be recorded as such and put aside.
12. Award Notification: Upon completion of the proposal evaluation process, the successful proposer will be formally notified by mail or email by CCSCC.

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**ATTACHMENT A - STATEMENT OF QUALIFICATIONS**

RFP NUMBER: CCSCC-LPR0325 – Consultation Services for Organization Cultural Assessment				
PART I - APPLICANT INFORMATION				
<b>Applicant Name:</b>				
<b>Type:</b>	Individual/Sole Proprietor or Single-Member LLC	<input type="checkbox"/>	C Corporation	<input type="checkbox"/>
	S Corporation	<input type="checkbox"/>	Partnership	<input type="checkbox"/>
	Nonprofit	<input type="checkbox"/>	Other:	<input type="checkbox"/>
	Minority Business Enterprise, Small Business or Women-Owned Business.	<input type="checkbox"/>		
<b>Address:</b>				
<b>Name of primary contact</b>				
<b>Title:</b>				
<b>Email:</b>		<b>Phone:</b>		
<b>Years in business:</b>				

**Signature:** \_\_\_\_\_  
**Printed**

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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**ATTACHMENT B – REFERENCES**

<b>RFP NUMBER: CCSCC-LPR0325 – Consultation Services for Organization Cultural Assessment</b>	
<b>PART II - REFERENCES</b>	
<b>Client Name and Address</b>	
<b>Primary Contact Name, Phone &amp; Email</b>	
<b>Date of Services</b>	
<b>Services Provided</b>	
<b>How services provided are similar to those requested in the RFP.</b>	
<b>Client Name and Address</b>	
<b>Primary Contact Name, Phone &amp; Email</b>	
<b>Date of Services</b>	
<b>Services Provided</b>	
<b>How services provided are similar to those requested in the RFP.</b>	

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<b>Client Name and Address</b>	
<b>Primary Contact Name, Phone &amp; Email</b>	
<b>Date of Services</b>	
<b>Services Provided</b>	
<b>How services provided are similar to those requested in the RFP.</b>	