



Contracting for Transformation

HOW TO DESIGN HUMAN SERVICES PROCUREMENT
FOR EQUITY AND WELLBEING

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What is this toolkit?

This toolkit is a how-to guide for human services agencies seeking to create a procurement process that helps to reimagine systems in ways that support equitable access to wellbeing. While a procurement process that uses equitable access to wellbeing as a design principle should have all the elements in this toolkit, it may not be feasible to take all the included and recommended actions at once. As such, the toolkit is customizable so that agencies can select the pieces most aligned with their specific needs and shift as necessary across time. We recognize there are elements of the process out of an agency's control and/or where shifts may require changes to statute or regulations. We encourage agencies to be aware of these and advocate for change. However, within this toolkit, we focus on elements that more generally are within the discretion of the procuring agency.

While the wellbeing framework (see "What do we mean by wellbeing?" [\(page 5\)](#) embodied in this toolkit can be applied in any system – justice, medicine, education, labor, workforce and more – for this toolkit, we have tailored the process to human service systems.

The toolkit is structured into six sections:

1. The rationale for using equitable access to wellbeing as a design principle in procurement.
2. Principles of a procurement that uses equitable access to wellbeing as a design principle.
3. Important considerations for the procuring agency prior to releasing a Request for Response (RFR).
4. A new kind of bidder's conference.
5. Reviewing proposals.
6. Appendix:
 - a. Questions bidders should answer.
 - b. Principles for procurement.
 - c. Scoring guide cheat sheet.
 - d. A self-assessment on using equitable access to wellbeing as a design principle.

Want to take this further?

This toolkit only covers what to include in a Request for Response (RFR) in those sections where the agency may have significant flexibility, and then how to score those elements of responses. However, procurement is more than the RFR itself. An RFR that uses equitable access to wellbeing as a design principle additionally includes examining:

- Who is writing/consulting on the RFR.
- How the RFR is distributed and who sees it.
- How monitoring and data collection are carried out.
- Identifying structural changes within your agency that may be limiting the impact of the procurement.

If you are interested in taking your procurement process further, please contact us at learn-more@fullframeinitiative.org and we'd be glad to share additional resources with you.

What do we mean by wellbeing?

This toolkit defines wellbeing as the set of needs and experiences that are universally required, in combination and balance, to weather challenges and have health and hope.

A wealth of research and evidence, combined with human experience, have identified this set of needs and experiences to contain five elements: social connectedness, stability, safety, mastery and meaningful access to relevant resources. Below, we provide a brief overview of each of these five domains (For more information, visit fullframeinitiative.org/resources).

Social connectedness is the experience of having people we can count on, being valued and counted on by others, and the experience of belonging.

Stability is the experience of predictability, the presence of the familiar (what is around us) and the knowledge that a small challenge won't trigger a cascade of crises.

Safety is the experience of manifesting core parts of one's identity (e.g., race, religion, sexual orientation) without being in physical or emotional danger.

Mastery is the experience of being able to influence one's future, relationships and/or situation; of there being a correlation between one's efforts and outcomes; and of having options and purpose.

Meaningful access to relevant resources acknowledges people's need to meet their needs that are material (e.g., food, shelter), without shame, danger or great difficulty in ways that are relevant to them.



Several key implications of this definition include:

- People are "hardwired" for wellbeing.
- Access to wellbeing is a *driver*, not just a product, of health, hope and resilience.
- These Five Domains of Wellbeing are interdependent, not hierarchical.
- Wellbeing is the combination and balance among the domains.

Past experiences impact our experience of these domains. For example, past experiences of trauma may influence our ability to connect with others, what is safe/unsafe, sense of how we are able to influence our environment and more.

Furthermore, while the drive for wellbeing is universal, access to it is not. The systemic oppressions – racism, sexism, ableism, etc. – in our country make it more difficult for some people to meet their needs for wellbeing than for others. For example, research shows that landlords are less likely to rent an apartment to people who are Black or Brown.¹ This makes it much more difficult to meet needs for meaningful access to relevant resources and has implications for mastery (ability to affect one’s future). And people who are Black or Brown are more likely to be stopped while driving,² which has impacts on safety and stability. It’s not random who has access to more or less wellbeing.

Balancing tradeoffs is an essential component of wellbeing.

Our wellbeing is more than having some minimum assets in each of these Five Domains. As humans, we are hardwired and driven to make choices to experience greater wellbeing; The choices we make reflect our understanding of the involved “tradeoffs.” Tradeoffs are the immediate and long-term costs of a decision, action or (in)action. Wellbeing requires that people be able to manage tradeoffs – to move forward in one of these domains without too great a cost in other domains. For example, even though someone may be excited and eager to obtain housing, they may actually have decreased wellbeing overall if this housing requires them to move far away from all their social connections, a job they love and everything familiar to them – it may not be worth it and they will either not take the housing or leave it later down the road. However, if they were given bus passes so that they could see their loved ones or had several months to become familiar with the new location, it may be worth it. This concept of balancing tradeoffs is essential to those of us in human services who are working relentlessly to increase access to wellbeing for individuals in our systems.



In a governmental context, programs and systems have inequitable processes and outcomes in part because they tend to drive towards optimizing one outcome, without significant consideration of the generalized or specific “cost” of that progress – loss of social networks, financial cost or anything else. Whether that “cost” is tolerable to the person making the change is usually determined by the program or authority. The inherent othering in our systems can lead well-intentioned frontline workers and policymakers to discount the cost of change because we weigh tradeoffs differently for others. Our projects and programs focus on the acquisition of progress and change; our personal wiring is for loss aversion. These forces can converge when the cost of change is too high, even if the change itself is desired. This undermines the long-term durability of outcomes. The concept of tradeoffs and the importance of not confusing motivation and tradeoffs is explained in this three-minute video: [Tradeoffs](#). The connections between tradeoffs, systemic and social inequities, and durable change are laid out in this three-minute video: [Do We All Have a Fair Shot?](#)

Why should human services agencies care about wellbeing?

People experiencing interrelated issues of poverty, trauma, violence and oppression face significant barriers to wellbeing, and for many, lasting progress is particularly elusive. This is true despite the hundreds of billions of dollars we as a society invest annually in human services. Most human service programs focus only on addressing discrete problems with formal interventions, often eroding social networks and opportunities for self-determination in the process. Yet people facing multiple complex challenges often define success as we all do: in the positive context of social connections, personal agency and creating value for themselves and others – all key elements of wellbeing.

Wellbeing as a design principle is:

- Aligns with people’s deep biological drive for wellbeing.
- Is a framework for understanding decision-making and behavior.
- Recognizes that every change comes with tradeoffs, even change we want.
- Changes the structures and environments people are in so that they can more equitably access wellbeing.

It is not:

- Extra or nice to have.
- A checklist of what you have to have.
- About getting people to do more to take care of their physical and mental health (sometimes called wellness).

¹ Christensen, P., Sarmiento-Barbieri, I., & Timmins, C. (2021). (working paper). Racial Discrimination and Housing Outcomes in the United States Rental Market. National Bureau of Economic Research. Retrieved June 9, 2022, from <https://www.nber.org/papers/w29516>.

² Communications, N.Y.U.W. (2020, May 5). Research shows black drivers more likely to be stopped by police. NYU. Retrieved June 9, 2022, from <https://www.nyu.edu/about/news-publications/news/2020/may/black-drivers-more-likely-to-be-stopped-by-police.html>

Using equitable access to wellbeing as a design principle allows for:

Durable change that is more equitable. While many services succeed in helping people make a change, these efforts struggle to ensure that change lasts. Many marginalized members of our communities who face multiple challenges – like homelessness, poverty and violence – end up stuck in a revolving door of services, repeatedly involved with and coming back to various services provided by or funded by different government agencies. With each “go round”, they are a little worse off – not back at square one. Because there is already racial and other disproportionalities in our systems, this dynamic is digging inequities in deeper. From a wellbeing perspective, a key factor that must be considered is the role of tradeoffs in undermining change. As described above, all change – required or voluntary – requires tradeoffs (i.e., making progress in one area while giving up assets in another). When the tradeoffs are too big, change doesn’t stick. To stop the revolving door and support durable change, procurements must not force unsustainable tradeoffs. Stopping the revolving door is an equity play. This inherently requires examination of inequitable structures, shifting them and involving the people most impacted by the structures in shaping them.

Working across issue areas. Efforts at coordination often fall short because agencies have separate mandates, each seemingly trumping the others. Moreover, traditional services are not set up to integrate informal support and community resources. Use of wellbeing as a design principle offers a common language that different agencies may use to integrate not only each other’s efforts, but also the role of informal support and community resources. It does this by grounding all actions in a common understanding of wellbeing, which drives all humans.

Reducing the push and pull that people in multiple systems experience. People who are systems-involved are frequently pushed and pulled in multiple directions by the variety of priorities that agencies impose through their structures. Through a shared goal of optimizing access to wellbeing, rather than optimizing each agency’s desired outcome, the push and pull that people experience will be reduced. This will mean fewer unsustainable tradeoffs and greater access to wellbeing for people who are systems-involved.

A common language that integrates multiple frameworks and approaches, including trauma-informed care. Operating from an understanding of wellbeing, by design, incorporates many of the frameworks and approaches already being used by agencies and organizations. Other models and frameworks can be nested within the Five Domains of Wellbeing to help people successfully make and sustain change. For example, it is being used to help a juvenile justice system incorporate principles and programs of trauma-informed care, positive youth development and family systems theory. The exceptions are frameworks that are philosophically antithetical to the Five Domains of Wellbeing. For example, deficit-based, punitive models and approaches are largely incompatible with the framework.

Leveraging the power and value of informal support and community resources. Human services agencies will never build enough programs to meet all needs – nor should they. The only way to move towards a country where everyone has a fair shot at wellbeing is to support the existing assets that are in communities and strengthen the bonds that allow people to thrive in community, with human services supplementing – not replacing – these supports. This includes using informal supports and tapping community resources.

Why aren’t our systems already using equitable access to wellbeing as a design principle?

In the United States, systems default towards programs and processes that are inequitable and force unsustainable tradeoffs. Built into our structures, including human services, is the racism and other forms of “othering” and diminishment that we see in our country currently and historically. Temporary Assistance for Needy Families (TANF), for example, has perpetuated harmful narratives about Black women that have resulted in paternalistic policies that inherently control Black women’s behavior and force tradeoffs in their lives resulting in long-term harm and decreased wellbeing.³ Structural racism lives in our systems under the guise of help.

To use equitable access to wellbeing as a design principle, we need to move away from system defaults and align our programs and processes with the values of equity and wellbeing.⁴

³ Floyd, I., Pavetti, L., Meyer, L., Safawi, A., Schott, L., Bellew, E., & Magnus, A. (2021). (rep.). TANF Policies Reflect Racist Legacy of Cash Assistance. Center on Budget and Policy Priorities. Retrieved June 9, 2022, from <https://www.cbpp.org/research/family-income-support/tanf-policies-reflect-racist-legacy-of-cash-assistance>.

⁴ Additional information about these values and on the assumptions in the table below may be found here: <https://bit.ly/3afK9ez>

Defaults built into our systems	Assumptions aligned with equity and wellbeing
<ul style="list-style-type: none"> • People coping with significant challenges are different, even deviant. • Everyone has access to opportunity. • Change is additive. • Sustaining change is about willpower. • Issues and problems are discrete. • People with challenges are pathologies wrapped in skin and services fix them. • Change happens at the level of the individual. 	<ul style="list-style-type: none"> • We're more alike than we're different. • Our circumstances are varied, and there are structural forces that block or undermine progress for some people more than others. • Change brings gains and losses. • Life is messy. • There's always something that's working. • Individual change is tied to family change, which is tied to community and social change



Too often, systems change actually is about making inequitable systems more efficient in their inequities. Instead, it is essential that we actually address the structural harms being perpetuated. This means challenging the core assumptions that are embedded in our culture and our systems.

Why focus on procurement?

Systems change is far broader than procurement, but procurement is an important lever in social change. The government spends hundreds of billions of dollars a year on human services, and how it spends this money matters.

Procurement is not a neutral action. What human services agencies pay for and how they do so drives practice and narratives – and so it can shift practice and narratives, too. Procurement either supports wellbeing or leaves space for systems to unintentionally undermine the wellbeing of people and further entrench inequitable outcomes. Procurement has the capacity to dramatically change what services are, rather than solidifying the inequities built into systems. Procurement can remove the barriers that are preventing people from making the progress they want, and build communities so that people are in an environment that supports long-lasting wellbeing.

What does procurement need to do?

Procuring agencies must clearly signal the shift. This is more than simply asking nonprofit organizations to do something differently. Because inequitable access to wellbeing, racism and other intersecting otherings, and oppressions are the rootstock of so many programs and fields, acknowledging that history and explicitly committing to addressing it is essential for change. When possible, the procuring agency's leadership should clearly signal that agency staff's work is to shift this history – not a separate exercise, nor one to be entirely outsourced to vendors.

Procurement processes must change. Procurements should include explicit, plain language discussion of the ways a given field or program has contributed to inequities and what measures are being taken to address that history and shift its course. This could include specific elements of response scoring, changes in required program elements or other specific actions, which are detailed in this toolkit.

Procuring agencies must be willing to reconsider what is eligible for payment, success and restrictions. To center wellbeing also means holding people at the center of procurement. As human services agencies become more aware of centering community and supporting durable change through using wellbeing as a design principle, procuring agencies will be impacted – what the government pays for, what counts as "success" and changing the restrictions connected with procurement – not just what nonprofits do.



Principles of a Procurement That Uses Equitable Access to Wellbeing as a Design Principle

Procurement aligned with people’s innate drive for wellbeing can support durable change at the level of an individual or family, and address inequities in programs and systems.

Using this approach, a procurement has six principles. One-page reference for these principles may be found in the Appendix on [page 39](#):

1. Start with wellbeing.
2. Design with, not for.
3. Leverage community assets, not just programs.
4. Support people in getting what they need and want; don’t just help them manage what they don’t have.
5. Recognize that systems are part of the problem.
6. Expect learning and evolution.

In this toolkit, we describe each principle in greater depth and provide guidance on addressing it in procurement in both program elements and organizational capacities.

Within each of these principles, we describe:

- Why this is important.
- What procuring agencies need to allow or expect bidders to do.
- Questions bidders should answer (a list of these is available in the Appendix on [page 36](#)).
- Scoring applicant responses (a cheat sheet of what to look for is available in the Appendix on [page 40](#)).

Given that procurements range from looking for vendors to carry out specific program models, to more open calls for proposals to address a specific need or challenge, the elements that follow can be put together in a number of different ways. Whether highly prescriptive or quite open, procurement has a major influence on the types of programs that are created through what is written into the RFR. In addition to program elements, organizational priorities and operations have a role to play in shifting our systems to centering on wellbeing, so both organizational and programmatic considerations are included.

1. Start with wellbeing

Access to wellbeing requires that people be seen as whole people, not simply problems to be solved. Systemic harms, including systemic and structural racism and othering, impact how participants are engaged and supported in the system. People who have felt persecuted by government agencies or have found themselves on the receiving end of paternalistic policies, for example, may be understandably reluctant to share information or engage with the system, despite individual staff members doing their best to pay attention to wellbeing.⁵

Furthermore, optimizing one outcome without regard for the tradeoffs involved at the individual, family or community level can undermine the durability of change (a wellbeing cliff effect). A system can be focused on one outcome, but should do so without triggering the wellbeing cliff effect.^{6 7}

Principle #1: Start with wellbeing

- A. Eligibility criteria designed to “screen in.”
- B. Focus assessment on wellbeing.
- C. Leverage existing social networks and build new social networks.
- D. Allow organizational affiliates (staff, Board and others) to leverage their own social networks.

⁵ This is as a result of the default that is built into and reinforced by our systems. This is true even when individual staff members are doing their best to take a wellbeing approach within systems that have been built this way.

⁶ Clearly, some of these tradeoffs are baked into policies and are outside the scope of procurement per se. For more on addressing tradeoffs in policy, including policy tools developed with government agencies, see Tradeoffs Analysis Tool (<https://bit.ly/3zsO5LB>) and the Wellbeing Blueprint recommendation 1.4: Change structures that force unsustainable tradeoffs (<https://wellbeingblueprint.org/blueprint>).

⁷ For an example of how one child welfare agency started explicitly considering tradeoffs at the level of practice, see Trauma-informed Pathways to Wellbeing (<https://bit.ly/3MzLb2s>), which provides strategies for supporting families in each domain, as well as highlighting common strategies that often force the wellbeing cliff effect.

Oftentimes, the response to this issue is to try to coordinate the competing priorities. However, better coordination of competing priorities isn't the answer – particularly if the priorities are agency priorities, not the family's. That coordination simply pits the outcomes that agencies measure against what matters to participants in terms of wellbeing. For example, when we coordinate the competing agency priorities of housing, safety, substance use and their associated appointments and requirements, that can push against what's most important to a participant, such as checking in daily to make sure a sick parent is okay. When we start with wellbeing, we make sure that what matters most to participants is part of the conversation.

This is what is meant by paying attention to tradeoffs – identifying the costs of decisions, action and inaction, and addressing them. Mitigating tradeoffs is built into each of the five elements associated with this principle while recognizing that tradeoffs may be weighed differently by different people.

A. Eligibility criteria designed to “screen in.”

① Why this is important:

People interacting with human service systems are facing multiple challenges. When we screen people out of programs because of life's complexities, we are incentivizing people to hide information that is important if we are to support their moving forward. “Screening in” means recognizing whole people, not just singular issues, and not requiring participants to leave other parts of their identity and experiences at the door. When programs accept participants based on minimal eligibility requirements, the environment enables participants to more genuinely share what is going on and allows for greater opportunities in reaching goals.

② What procuring agencies need to allow or expect bidders to do:

- Keep eligibility criteria to a minimum, engaging those they would normally “screen out,” recognizing this may affect “success rates.”
- Identify where systemic barriers are routinely leading participants to choose one identity over another.
- Have somewhat lower participant-to-staff ratios to support engagement and durable change.
- Provide additional training and support for staff to provide support to people facing complex challenges because it is the reality for the vast majority of people who are systems-involved.

③ Questions bidders should answer:

Formal language: Please describe the bidder's approach to participant eligibility requirements; how potentially eligible participants will be identified; how programs will be accessible for people with disabilities or limited mobility and those with no or limited English proficiency; creative outreach to those for whom the issue area (domestic violence, homelessness, substance use, etc.) is not the dominant identity; and creative solutions to managing caseloads and balancing open eligibility with limited resources without instituting inflexible termination policies.

Plain language: Tell us about your eligibility requirements and process. How do you determine eligibility? How do you increase accessibility for people with disabilities or limited mobility, those with no or limited English proficiency, and those who are undocumented? How do you creatively reach out to people who might not self-identify as [survivor, homeless, substance user, etc.]? How do you balance being accessible to most people while having limited resources and trying to limit termination policies?

Scoring applicant responses

What we're not looking for	What we're looking for
<ul style="list-style-type: none"> • Domestic violence, homelessness, substance use, etc. is the main issue always or primary identity. • Answers/language that force people into one identity, such as "survivor," "perpetrator," "victim," "homeless" or dehumanizes people (particularly people who use violence). • Inflexible rules that encourage termination and fail to consider tradeoffs or the role of trauma in participant behavior or decisions. • Eligibility based on the likelihood of "success." 	<ul style="list-style-type: none"> • Experience creating an inclusive environment for people with disabilities; people with limited or no English proficiency; people with a variety of religious and spiritual practices; and other barriers to services. • Creative outreach and partnerships to reach those for whom [survivor, homelessness, substance use] isn't their dominant identity. • Commitment to serving those who are ineligible for other programs, as demonstrated through few eligibility requirements and few termination policies.

B. Focus assessment on wellbeing (see Principle 2: Design with, not for, page 14).

C. Leverage existing social networks and build new social networks.

🕒 Why this is important:

People live in families and communities. While there is significant attention given to the importance of relationships in social services, the relationships considered are generally that between a program participant and a direct service provider (e.g., advocate, case manager). But people live in families and communities, not programs. In economically distressed communities, particularly communities of color, social connectedness is often highly regulated or even criminalized. The result can be unnecessary creation of programs to do what social networks would otherwise do, and the hamstringing of community potential and health.⁸

Social connections increase wellbeing, even imperfect ones. To the extent that social networks are considered, they are often seen only through the lens of "who can help my client?" But our social connectedness depends on relationships where we are valued and have impact. The social obligations participants may have to other people (e.g., a participant who checks in daily with her aging parents) are seen as burdens to be shed, rather than a core component of social connectedness. Imperfect social connections within a participant's social network are often labeled "unhealthy." However, these connections are actually increasing wellbeing for people.

Services can help enable change or respond to a crisis, but sustainable change requires strengthening all the supports and strategies that people rely on and contribute to. People receiving social services consistently identify social connections as a key element of personal success, and yet many conventional service systems ignore or even erode these connections.

Social connections that are embedded in multiple identities are essential for wellbeing. For durable change, social networks need to include people outside of the program or services – family, friends and community members. These should be relationships that are connected with the participants' multiple identities – not simply the "issue" they have (e.g., survivor, substance use, homelessness).

⁸ For more information, please see Principle 3: Build on Social Connections and Social Capital in the Wellbeing Blueprint (<https://wellbeingblueprint.org/blueprint>).

④ What procuring agencies need to allow or expect bidders to do:

- Provide some portion of their support to members of a participants' social network if that is useful. For example, if there is a relative who will allow a participant who is homeless to stay with them, but only if they contribute financially for food and utilities, allow bidders to pay for food and utilities so that the participant can stay with the relative.
- Pay particular attention to tradeoffs for social network members by tracking the tradeoffs associated with program participation or service use. (See Important Considerations for Procuring Agencies, [page 25](#).)
- Capitalize on a range of informal supports, including people's existing social connections and community, to support wellbeing. It's important to find a critical balance between providing needed services with the recognition that people have interests, relationships and strategies to thrive outside of programs. For example, rather than participating in formal parenting classes, a participant might be able to get support from their faith-based group or the neighborhood group that comes together to plan events. Find out what informal networks participants are a part of instead of defaulting to a formal program or service.
- Recognize that participants' social connections who aren't "perfect" or who present additional challenges may still be the most effective way of addressing participants' priorities. For example, a mother who regularly uses heroin, but is willing and reliable to help run errands for her adult child so that her child (the participant) can make it to a support group.
- Support the expansion of social networks. This means that participants are supported in making active and strong connections outside of the program. Participants should be connected to a range of social networks in the community through active networking and research, and by tapping into the information shared by participants themselves. This means not just meeting other participants through the program, but that participants are supported in, for example, taking yoga classes in the community or attending a film festival to meet other people.
- Work with multiple people or families as a cohort, not as separate cases. Programs should encourage, not discourage multi-family economic strengthening and resiliency efforts. For example, networks that become economically stronger are more resilient than individuals who become economically stronger than their networks."⁹

④ Questions bidders should answer:

Formal language: Please describe the bidder's experience working with program participants to identify, enhance and leverage participants' social connections, networks and community, outside and beyond the parameters of program staff and other participants. This includes supporting social connections not directly connected with participants' issue area(s), such as supporting social connections related to hobbies and other interests, as well as social connections that are "imperfect" and bring challenges. Please include specific activities, exercises and strategies tried and employed, and lessons learned.

Plain language: Tell us about how you build and leverage social connections outside of programs. How do you go about identifying social connections, networks and community beyond the program? How do they get strengthened and built upon? This can include social connections related to hobbies and other interests, as well as social connections that are "imperfect" and bring challenges. What activities, exercises and strategies have you used? What lessons have you learned?

⁹ For more information, please see Wellbeing Blueprint recommendation 3.2.3: Encourage multi-family economic strengthening and resiliency efforts (<https://wellbeingblueprint.org/blueprint>) and [UpTogether](#).

Scoring applicant responses

What we're not looking for	What we're looking for
<ul style="list-style-type: none"> • Discussions of social networks as either only healthy or unhealthy. • Emphasis on the relationship between staff and participants. • Language only about needs and challenges; how their org/work is addressing challenges and needs • When participant relationships outside of the organization are mentioned, they are primarily with other service providers or in relation to the "issue" or problem the participant has. 	<ul style="list-style-type: none"> • Strategies that strengthen existing social networks, such as supporting participants in navigating less-than-perfect relationships, paying for transportation and/or phone access to connect with friends and relatives, and supporting people in maintaining commitments to others. • Policies that don't limit or prohibit contact with certain people or connections. • Strategies to build new social networks that speak to the range of identities a participant has (e.g., religion, in recovery, gardener), not just the program identity (e.g., survivor). This includes activities such as helping to pay for tickets or entry to events with like-minded people (e.g., a film festival or gaming conference), or warm hand-offs to social clubs, local associations, networking groups or faith communities. • Policies that allow for participants to define "family" and include support, programming and activities for extended family members and friends.

D. Allow organizational affiliates (staff, Board and others) to leverage their own social networks.

ⓘ Why this is important:

Traditional approaches and the professional distance between provider and participant serve to limit the ability of programs to actively expand social networks. "The poor have few extensive linking or bridging ties, and are left instead to draw upon their intensive bonding relations (family, friends, neighbors) to manage high levels of risk and vulnerability."¹⁰ We grow through diverse and varied relationships. When we only know people who are like us, growth becomes more difficult. Organizational affiliates need to be encouraged to increase wellbeing by bringing their own social networks to bear.

➡ What procuring agencies need to allow or expect bidders to do:

- Allow organizational affiliates to call on their social networks to support both the group and the participants. For example, a staff member may call his sister to recommend a participant for an internship at her company.
- Use funding to support practices that include organizational affiliates leveraging their own networks.

❓ Questions bidders should answer:

Formal language: Provide examples of how your organization has identified, cultivated and leveraged relationships with informal resources, community resources and non-traditional partners, outside the realm of professionalized services or providers. Additionally, explain how your organization contributes to the community outside of services (for example, being a resource to other groups) and how you have leveraged organizational affiliates' (board, staff, etc.) social networks to support the group of participants or individual participants.

Plain language: Tell us about your relationship with the community and your experience operating outside of professional services. How has your organization developed relationships with those outside of professionalized services or providers? This can include informal resources, community resources and non-traditional partners like pet sitters, barbershops, mechanics, etc. How does your organization support the community? How have you allowed organizational affiliates (board, staff, etc.) to use their social networks to support a group of participants or an individual participant?

¹⁰ Easterly, William & Woolcock, Michael & Ritzen, Jozef. (2006). Social Cohesion, Institutions, and Growth. Economics and Politics. 18. 103-120. 10.2139/ssrn.983117.

Scoring applicant responses

What we're not looking for	What we're looking for
<ul style="list-style-type: none"> • Aspirations to do so in the future. • Emphasizing the line between personal and professional boundaries. 	<ul style="list-style-type: none"> • Concrete examples of previous instances of leveraging social networks of organizational affiliates. • Discussion of holding the productive tension between professional boundaries and the wellbeing benefits to participants.

2. Design with, not for.

Power lies in who gets to define a problem (framing), which involves naming the problem, identifying assets and solutions, and setting goals. Involving participants in design must happen on the level of the individual program participant, as well as in the creation of the program itself.

Community framing is profoundly different from defining problems and goals for people and communities and asking them for feedback on the intervention being considered. Furthermore, communities that are less wealthy and less white have had power shifted out of their communities and handed over to public systems. Involving communities and participants as partners is more than simply doing what's right, although that's valuable in and of itself. When community members lead in designing programs, the programs are better and more effective because community members can pre-emptively consider challenges.

Principle #2: Design with, not for

- Staff facilitate, rather than conduct, assessment (also known as "co-assessment").
- Participants create value and have voice.
- Staffing reflects the community participating in the program.

A. Staff facilitate, rather than conduct, assessment (also known as "co-assessment")¹¹.

📌 Why this is important:

Facilitation supports participants in taking stock of their assets and challenges through a wellbeing lens, identifying short-term changes that are needed and desired, and creating and implementing a plan to make these changes without creating unsustainable tradeoffs. Facilitation may include safety and wellbeing planning, practical implementation support, counseling, advocacy, assistance navigating other systems and service providers, referrals, transportation, and support tapping into non-service community resources. At every stage, facilitator and participant work in partnership, with an emphasis on identifying and leveraging informal social connections and networks; creative, non-program-based solutions; and minimizing the tradeoffs of decisions and change. This is important because:

People need to be able to bring their own expertise to bear. Participants know best what tradeoffs they are weighing, what would get in the way of sustainable change, and what is most important to work towards. However, participants in human services are no more omniscient than anyone else. Staff support in surfacing and articulating what those tradeoffs and steps are can be essential. Rather than managing participants, staff should see themselves as facilitators of the process and, together, staff and participants are co-assessing to identify what's working, what are challenges, goals, tradeoffs, etc.

Life situations constantly evolve. This approach moves away from a response determined primarily by a provider's assessment of a participant's needs to a joint co-assessment between provider and participant. No two co-assessments look alike and none is etched in stone; instead, the process evolves alongside the participant's preferences, situation and decisions.

¹¹ The Full Frame Initiative has created a number of toolkits to help programs shift to a co-assessment stance based on wellbeing. These include From Safety Planning to Wellbeing Planning (<https://bit.ly/3zu6lvU>) and Engagement Discovery Kit (<https://bit.ly/3aUP5G6>). For more information on the difference between these concepts, please see slides 16-18 in the example reviewer training slides: [Example Reviewer's Training for Toolkit.pptx](#)

➔ **What procuring agencies need to allow or expect bidders to do:**

- Let participants lead in the assessment process while staff act as facilitators in assessment.
- Discuss tradeoffs in relationship with every step taken and have protocols for deviating from standard practice when tradeoffs identified throughout this process are unsustainable. For example, if going to a much-needed series of appointments means that a participant’s child has to miss basketball practice and drop out of the team, allow options such as the program transporting the child to basketball practice.¹²
- Support participants in working towards goals that may not be directly related to the traditional issue area. For example, a participant coming to do a domestic violence program who wants to work on their GED.
- Change direction and steps in working with a participant over time, based on the changing understanding of the situation.
- Provide choices and options for the participant wherever possible.
- Be flexible and creative in actions taken to support participants.

❓ **Questions bidders should answer:**

Formal language: Please describe the bidder’s approach and experience providing services and supports that are person-centered, build on participants’ assets, address the tradeoffs of change, and incorporate participant voice and input into program design and implementation. Please describe where the bidder is not as strong in this regard as well.

Plain language: Tell us about your experience and approach in providing services and supports that are person-centered, build on strengths and address the tradeoffs of change. How do you involve participants in program design and implementation? Where do you struggle with this?

Formal language: Please describe the bidder’s assessment process and who leads the assessment and decisions about what steps to take. How does the bidder integrate wellbeing into their assessment process? How do participants’ understanding of their situations, which typically change over time, factor into assessment and progress planning? How does the program address situations where staff and participants disagree on the path forward?

Plain language: Tell us about your assessment process. How does it incorporate wellbeing? Who leads the assessment and decides on what steps to take? How does your process take into account the reality that participants’ understanding of what’s going on changes over time? What do you do when staff and participants disagree on the path forward?

Scoring applicant responses

What we’re not looking for	What we’re looking for
<ul style="list-style-type: none"> • Language that assumes that people don’t know what they need, infantilizes survivors, is patronizing, etc. • Assessment is described as an evaluative and deterministic assessment process. When it’s done, it’s done. • Assessment is unidirectional, with one person (professional) assessing another person’s situation and making a determination about what should happen next (e.g., what’s the matter with you?). The “provider” is the ultimate arbiter. • Assessment is driven by the problem, diagnosis and needs/challenges (e.g., what’s the matter? What do you need?) 	<ul style="list-style-type: none"> • Language that demonstrates partnership with the participant. Participants have complete access to their files and information about them, and they determine what, how much, when, for how long and with whom their information is shared. • Assessment is bi-directional, participant-driven and changing/fluid: focuses on a relationship where both parties influence each other’s thinking but where the person whose situation is being co-assessed is seen as the ultimate expert. Alignment and difference in perspective are explored, not squelched. How we understand ourselves can shift. • Indication that the participant is a whole person with assets, relationships, interests as well as needs and challenges (e.g., what matters to you?). Focuses on what’s going well and what has worked in the past. • Tradeoffs are explored at every step and there is recognition that all change creates tradeoffs (e.g., increasing safety by leaving a gang may decrease safety on the streets. Increasing safety may decrease stability or social connectedness).

¹² Procuring agencies may not have complete control over how they are able to distribute and use funding. This toolkit recommends being as flexible and innovative as possible within the confines of the restrictions and limitations procuring agencies must abide by.

B. Participants create value and have voice.

① Why this is important:

Programs are more effective when participants and communities are involved. When community members lead in designing programs, the programs are better and more effective because community members can pre-emptively consider challenges. Participants and community members have special insight into tradeoffs and scenarios that program staff and others may not be aware of or privy to. Additionally, since they are not steeped in the culture of the system, it may be easier for them to come up with and put forth out-of-the-box and innovative solutions that may not occur to others.

When participants are involved, it allows everyone to put energy into their highest and best use. Co-determination and co-ownership of programs are more efficient and sustainable. Having all community members – program leadership, staff, participants and volunteers – contribute to the community's success creates avenues for wellbeing (e.g., mastery and social connectedness), increases the likelihood that progress will be aligned with people's goals and takes the burden off of professional staff to address or respond to every situation. Additionally, people affected by and working in systems are well positioned to identify solutions – they may be able to describe "small hacks" that can have dramatic changes. Participants can contribute in ways that are meaningful to them and staff are freed up to focus on where they are explicitly needed.

For their wellbeing, people need to give back and contribute value. Giving back is also healthy and necessary. People overcome trauma, crisis and illness faster when they can experience reciprocity. Always being a taker creates an enhanced sense of vulnerability and can be damaging physically and emotionally over time. Sharing one's skills and talents often increases feelings of accomplishment, which can help to create the feeling of being able to accomplish change in other parts of life.

➔ What procuring agencies need to allow or expect bidders to do:

- Allow participants to be true partners in the work and experience having an influence on the program they are part of, even as they are receiving services and support.
- Include community members in the design of programs and compensate them for involvement and expertise.
- View all people as receivers and givers and believe that reciprocity is key to healing and sustainable change.
- Recognize participants for the range of experiences, challenges and assets they bring to the program.
- Support participants in becoming advocates/activists, not simply service recipients.

❓ Questions bidders should answer:

Formal language: Please describe the bidder's approach and experience providing services and supports that are person-centered, build on participants' assets, address the tradeoffs of change, and incorporate participant voice and input into program design and implementation. Please describe where the bidder is not as strong in this regard as well.

Plain language: Tell us about your experience and approach in providing services and supports that are person-centered, build on strengths and address the tradeoffs of change. How do you involve participants in program design and implementation? Where do you struggle with this?

Formal language: Please describe the bidder's experience and approach to including community members or participants in key roles of the organization or in program design and how the bidder has prepared and supported participants to be advocates/activists, not just service recipients. Describe how staff reflect the community and measures taken to ensure that community members are able to participate in program design, including measures such as budgeting for community member compensation or removal of requirements to consider criminal records as an immediate disqualification to hiring.

Plain language: Tell us about your experience including community members or participants and how your idea is centered on the needs and demands of the community, and who will participate in this project. What was the role of the community in shaping this idea? How do you tap participants' and residents' expertise, and how are they involved in the implementation of the project?

Scoring applicant responses

What we're not looking for	What we're looking for
<ul style="list-style-type: none"> • Participants are barred from holding organizational roles as they are receiving services – as staff members, as volunteers • Activities are crafted solely by staff with input via participant survey or focus group. • Language only about needs and challenges; how their org/work is addressing challenges and needs. 	<ul style="list-style-type: none"> • Opportunities for participants to lead or co-lead activities and help other participants navigate dynamics. • Participants in key organizational roles, such as on the Board, hired as consultants, training others, program development teams, policy review committees, etc. • Incorporation of participants and community members in program design, such as evidence that participant voice and input was part of creating the proposal or examples of when a substantive change in philosophy, practice or policy has been made in response to participants' voices. • Supporting participants to be advocates/activists, not just service recipients. Activities designed to raise participants' and public awareness and consciousness.

C. Staffing reflects the community participating in the program.

ⓘ Why this is important:

Driving change that will last requires centering community¹³. At times, formal programs may inadvertently supplant informal networks and services that already exist in the community. This not only duplicates, but may even undermine what's working, leaving communities worse off. People of the community know best what is needed in the community and are able to identify informal assets that providers may not know about. In culturally specific communities, community members are able to bring expertise and an understanding of how the community operates that may be difficult to identify as an outsider.

➔ What procuring agencies need to allow or expect bidders to do:

- Work is carried out and managed by participants and community members who are compensated for their work.
- Budget compensation for participants and community members to participate in program design.
- Prioritize hiring staff who see people not problems. Because the nature of services and supports provided is broad and based on the full context of people's lives, having staff with varied lived experiences and expertise is crucial.
- Prioritize hiring staff who are reflective of the community.

❓ Questions bidders should answer:

Formal language: Please describe the bidder's experience and approach to including community members or participants in key roles of the organization or in program design and how the bidder has prepared and supported participants to be advocates/activists, not just service recipients. Describe how staff reflect the community and measures taken to ensure that community members are able to participate in program design, including measures such as budgeting for community member compensation or removal of requirements to consider criminal records as an immediate disqualification to hiring.

Plain language: Tell us about your experience including community members or participants and how your idea is centered on the needs and demands of the community, and who will participate in this project. What was the role of the community in shaping this idea? How do you tap participants' and residents' expertise, and how are they involved in the implementation of the project?

¹³ For more information on centering community, please see <https://wellbeingblueprint.org/events/centering-community-shifting-power-relationships>.

What we're not looking for	What we're looking for
<ul style="list-style-type: none"> • Prioritization of hiring staff who only have professional training for clearly defined job roles, rather than alignment with beliefs and values. • Requirements that prohibit employment of staff with any criminal record. • Staff and teams that do not represent the communities served. • Relying on professionals for work that might be done in part or full by people who reflect the community participating in the program. 	<ul style="list-style-type: none"> • Hiring strategies that prioritize resonance with organizational values, ethical fiber and personal desire to grow, as well as professional expertise (through personal experience or training) and ability to tolerate ambiguity. • Requirements that do not consider criminal records as an immediate disqualification to hiring. • Staff represent the communities served or have used the services themselves. • Budgets include compensation reserved for participants and community members for their work.

3. Leverage community assets, not just programs.

People ought to live in communities, not simply programs. Human services' default has been to respond to challenges by increasing the number of programs available to participants. These frequently create their own set of challenges – forcing tradeoffs for participants and undermining what's already working in participants' lives and their communities. This is not to say there's not a role for programs, rather that we must identify and leverage community assets as central to addressing challenges. It means strengthening what's working well in communities (even if informal) and calling upon social connections that already exist within participants' networks.

Principle #3: Leverage community assets, not just programs

- A. Position the program as adding to what exists in the community, not replacing it.
- B. Leverage social connections.

A. Position the program as adding to what exists in the community, not replacing it.

① Why this is important:

For every person and every community, there are assets. These are often informal assets – a church where people turn to for food and mental health care, a hardware store that gives people second chance jobs, a home meal service. Rather than replacing these community assets with services and thereby undermining the community, procurement has a role to play in supporting and leveraging them so that the community that people live in for the long-term can be strengthened. People live in communities, not services – it is only through building the communities people live in that we can get to increased wellbeing.

➔ What procuring agencies need to allow or expect bidders to do:

- Pay for staff to spend a portion of their time cultivating relationships with community assets.
- Spend a portion of funding helping participants who are part of the informal economy become legitimized (e.g., paying for the certification of informal daycare arrangements that already exist in communities and people are already using).
- Incorporate non-traditional approaches and programming, such as including the arts and culture as part of the application, as these are essential assets in many communities.
- Submit letters of support from informal or non-traditional partners (e.g., church, library, auto repair shop, barbershop, etc.).

❓ Questions bidders should answer:

Formal language: Please describe the bidder's experience working with program participants to identify, enhance and leverage participants' social connections, networks and community outside and beyond the parameters of program staff and other participants. This includes supporting social connections not directly connected with participants' issue area(s), such as supporting social connections related to hobbies and other interests, as well as social connections that are "imperfect" and bring challenges. Please include specific activities, exercises and strategies tried and employed, and lessons learned.

Plain language: Tell us about how you build and leverage social connections outside of programs. How do you go about identifying social connections, networks and community beyond the program? How do they get strengthened and built upon? This can include social connections related to hobbies and other interests, as well as social connections that are “imperfect” and bring challenges. What activities, exercises and strategies have you used? What lessons have you learned?

Formal language: Provide examples of how your organization has identified, cultivated and leveraged relationships with informal resources, community resources and non-traditional partners, outside the realm of professionalized services or providers. Additionally, explain how your organization contributes to the community outside of services (for example, being a resource to other groups) and how you have leveraged the social networks of organizational affiliates (board, staff, etc.) to support the group of participants or individual participants.

Plain language: Tell us about your relationship with the community and your experience operating outside of professional services. How has your organization developed relationships with those outside of professionalized services or providers? This can include informal resources, community resources and non-traditional partners like pet sitters, barbershops, mechanics, etc. How does your organization support the community? How have you allowed organizational affiliates (board, staff, etc.) to use their social networks to support a group of participants or an individual participant?

Scoring applicant responses

What we’re not looking for	What we’re looking for
<ul style="list-style-type: none"> • Only discussing formal services. • Only stating intent without concrete past examples of doing this. 	<ul style="list-style-type: none"> • A history of non-traditional partnerships, not just stated intent. This should be expressed through examples of how the bidder cannot do their work without community partners and/or examples of a problem or challenge that was solved (at least in part) by leveraging non-professionalized services (e.g., referring a participant to a car mechanic that allows for partial payment over time). • Examples of community knowledge only available to those actually rooted in community, such as knowing where in the community people gather or knowing informal community leaders (not service providers). • Examples of how the bidder’s organization is an informal resource to its community (e.g., provides space after-hours to groups).

B. Leverage social connections (see Leverage existing social networks and build social networks, page 11).

4. Support people in getting what they need and want; don’t just help them manage what they don’t have.

Instead of reserving funding for staff to support people in managing poverty, what would often be most effective both for outcomes and financially, is buying people what they need. For example, instead of a staff person meeting with a reclusive shelter resident to overcome her shame of how she looks because her eyebrows were burned off, programs need the flexibility of simply buying the shelter resident an eyebrow pencil. If we focus on wellbeing, programs need the flexibility to pay for things like car repairs so that people are able to meet their commitments and have some control over their environment.

Principle #4: Support people in getting what they need and want; don’t just help them manage what they don’t have

- A. Require use of flex funds.

Furthermore, this doesn’t mean supporting people in getting what the program thinks they need. Starting with wellbeing requires that people are supported in getting what they want. More often than not, people want the progress and steps that the program wants to see; however, the costs are too great and aren’t worth it. A traditional approach is to increase the costs of not taking those steps. For example, if you don’t participate in this program, you will get kicked out of shelter. However, this does nothing to address the tradeoffs. For example, participation in the program means that they can’t go to band practice, which is the one area in life they feel they excel at. If we neglect examining and mitigating tradeoffs, we risk short-term gains at the expense of wellbeing.

A. Require use of flex funds.

① Why this is important:

Instead of reserving funding for staff to support people in managing poverty, what would often be most effective both for outcomes and financially, is providing the financial support needed to address the challenge. Programs need the flexibility to pay for things like car repairs so that people are able to meet their commitments and have some control over their environment. This would lift overall wellbeing and ultimately get to better outcomes.

As mentioned in the introduction to this toolkit, the way our systems are set up defaults toward systemic racism and the forcing of tradeoffs for people. Flex funds can help in two ways:

1. To make tradeoffs more sustainable until policy changes. For example, a participant who has a state-funded cell phone with limited minutes has to choose between spending those minutes on hold for a housing appointment or calling a loved one because there's not enough for both. Rather than using staff time to convince a participant to use their minutes for the housing appointment, flex funds could pay for additional minutes so that both are possible.
2. To help fill a gap not related directly to a tradeoff, but more to a financial shortfall. Without flex funds, a person might not be able to continue moving forward (e.g., fixing car brakes would make it more possible for a participant to make it to activities and appointments that staff would otherwise have to figure out how to troubleshoot (including personally driving the participant); or would be encouraged and supported to accept something that a small amount of funds could address (e.g., instead of a staff person repeatedly talking with a reclusive domestic violence shelter resident distraught over how she looks because her eyebrows were burned off and unable to afford an eyebrow pencil, that staff person needs the flexibility of simply buying the shelter resident an eyebrow pencil.¹⁴) Often, staff members pay for this kind of support out of their own pockets, when this should be seen as a core part of support to participants.

Not only do both of these uses save money and time, but they are more effective in the long run, shifting power to the participant, providing more opportunities for self-agency, and ultimately, increased wellbeing.

② What procuring agencies need to allow or expect bidders to do:

- Pay for improvements to participants' assets (e.g., fixing the taillight on a car).
- Allocate a certain amount of their budget as flex funds that are designated to directly benefit an individual rather than paying for staff salaries or program supplies.
- Actively work against the assumption people in poverty cannot manage money.
- Use flex funds to meet emergent needs and shortfalls and address the unsustainable tradeoffs experienced by participants.
- Make flex funds available quickly and simply to participants in need, without being hoarded or spent immediately.

③ Questions bidders should answer:

Formal language: Describe the bidder's plan for using flex funds in order to support participants and the organization in doing what may not otherwise be possible. Explain how flex funds will be available quickly with accountability and flexibility, given limited flex funding.

Plain language: Tell us about how you plan to use flex funds. What do you anticipate flex funds will allow your participants and your project to do that aren't otherwise possible? How do you plan to approach using flex funds to ensure that they are available quickly, accountably and flexibly, given that these are finite resources?

¹⁴Shared anonymously in the recent public virtual workshop series, Making Change Stick: Understanding and Addressing Tradeoffs.

Scoring applicant responses

What we're not looking for	What we're looking for
<ul style="list-style-type: none"> • Flex funds only being used in "emergency" situations such as evictions, health crisis (e.g., need insulin). • Flex funds are spent immediately or hoarded. 	<ul style="list-style-type: none"> • Flex funds are meeting emergent needs and addressing the unsustainable tradeoffs experienced by participants. • Flex funds are made available quickly and simply. • Program articulates what flex funds would allow participants and the program to do that wouldn't be otherwise possible.

5. Recognize that systems are part of the problem.

Traditionally, the prevalent narrative has been that people who are caught up in systems are the ones that need to make change – to make tradeoffs in order to adjust to benefits requirements or program priorities. Not only does that not work, but it actually can reduce people's overall wellbeing (see Balancing tradeoffs is an essential component of wellbeing, [page 6](#)).

However, systems are actually part of the problem – inadvertently forcing tradeoffs for people that reduce their wellbeing and increase reliance on systems creates a vicious cycle. As described earlier in this toolkit, systems default towards inequities, both creating them and deepening existing ones. To make this shift towards being centered in wellbeing and equity, all pieces of the system, including programs and procurement, must actively work against the defaults. Bidders should be expected to address that history in their response and how their proposed program/product contributes to shifting that history.¹⁵

A. Have an interest in addressing systemic barriers and inequities, not just getting better at fixing people.

① Why this is important:

Many of the barriers to wellbeing are erected by systems themselves through historical inequities that have been codified into policies and rules. Presently, organizations spend an exorbitant amount of time working around those barriers, navigating paperwork and meeting requirements that impact people inequitably. To center wellbeing means removing those systemic barriers and inequities. Only organizations who are practiced in doing so will be able to notice the barriers, identify them and articulate them so that they may be addressed.

Principle #5: Recognize that systems are part of the problem

- A. Have an interest in addressing systemic barriers and inequities, not just getting better at fixing people.

➔ What procuring agencies need to allow or expect bidders to do:

- Express priority for having racial equity or social justice lenses in service development and delivery. This enables organizations to recognize when inequities are built into systems.
- Recognize that many problems that participants experience are systemic and not personal. It is easy to stop at blaming the individual, organizations doing wellbeing work must be able to pull back the lens and see the full picture to identify the systemic barriers at play.
- Describe the issue areas the organization is involved with as systemic and not personal.

❓ Questions bidders should answer:

Formal language: The bidder shall provide a brief narrative of its organization, including subcontractors and mission, that specifically addresses how the organization's mission relates to the scope of work expected of the bidder. This must include the organizational values and philosophical approach to serving the intended population and how this approach aligns with the program being proposed.

¹⁵ For more information, please see Wellbeing Blueprint recommendation 1.1: Be public about the historical roots of our fields and agencies, and our journey towards equity and wellbeing and recommendation 1.1.1: Post this history and our commitments to change on agency, community, organizational and company websites, and co-create a report card with the community on progress towards commitments.

Plain language: How is your mission aligned with what we hope to accomplish with this procurement? Tell us about how you make your values “real” for the people this project/program is intended to support.

Formal language: Please describe how the bidder’s knowledge of social forces such as racism informs their approach, and how a racial equity and social justice lens is incorporated into programming. Explain how this project contributes to addressing the systems-related challenges individuals face. Please describe the bidder’s cultural humility and accessibility as an organization, inclusive of how those values are translated to staff, and a sensitivity to values, beliefs and needs that are associated with a person’s age, physical or mental ability, gender identity, sexual orientation, racial, ethnic, religious or cultural background.

Plain language: Tell us about how you’re addressing inequities. How does this effort address inequities and racism? How does your project direct as much funding as possible to the communities hardest hit? How do you increase accessibility for people with disabilities or limited mobility, those with no or limited English proficiency, and those who are undocumented? How do you support staff in addressing inequities and racism?

Scoring applicant responses

What we’re not looking for	What we’re looking for
<ul style="list-style-type: none"> • Policies and practices that prioritize white, dominant culture.¹⁶ • Description of core issues as solely attributed to individuals (e.g., there are 2,500 homeless families in the City of X). 	<ul style="list-style-type: none"> • Examples of how the bidder has made changes to practices and policies as a result of increased attention to racial and other equity (e.g., “we used to...now we...”) • Description of the core issues the bidder works on (violence, eviction, homelessness, public benefits, etc.) references social and environmental context (e.g., the City of X has only added 200 affordable housing units over the last five years, even as the population has increased by 10,000. As a result, the waiting list for housing has ballooned to 2,500 families, many of whom are now homeless.) • Organizational resources directed to staff training, organizational development and coaching in diversity, equity and inclusion.

6. Expect learning and evolution.

Learning and growth are vital in work with individuals, as well as in organizational development. No bidder will already be doing everything perfectly or exceptionally, but there are often indicators that they are part-way there.

A. Prioritize organizations and leadership that take a learning and innovation approach.

📌 Why this is important:

It is clear that the way our systems operate isn’t working. Funding more of the same efforts won’t result in changes. The only way to shift systems is to fund efforts that are innovative, that shift away from existing systems assumptions and really lean into the wellbeing-oriented assumptions like those described at the beginning of this toolkit. However, what is holding those assumptions in place is a complex intersection of policies, structures, practices and culture. Tackling this requires continuous evolution – as individual components shift, this frequently opens the door to or shines a spotlight on other pieces of the program that need to shift as well. There is no prescription for this. No two communities are alike, and cookie-cutter replication rarely works. Innovation itself requires continuous learning and refining and adaptation.

Adaptation is necessary because political, social, funding, cultural and other contexts, as well as the ecosystem of interventions that a given organization is part of, vary wildly from one community to another and can change dramatically over time.

Principle #6: Expect learning and evolution.

- Prioritize organizations and leadership that take a learning and innovation approach.
- Support a learning and innovation cohort.
- Expect service plans to change, particularly in programs providing ongoing support.

¹⁶ For more information on white dominant culture, please see: <https://www.whitesupremacyculture.info>

➔ **What procuring agencies need to allow or expect bidders to do:**

- Change their program approach over time based on learnings.
- Have a track record (interest, capacity and experience) of innovation at the organization, whether deemed successful or unsuccessful. Innovation necessarily requires some degree of “failure” that can be learned from.¹⁷ When the status quo doesn’t work and is harmful, there is no other option than to innovate.
- Propose programs that are embodying the elements described in the previous section and express clear support for these efforts from leadership.

❓ **Questions bidders should answer:**

Formal language: Describe the bidder’s experience and commitment to a learning and innovation approach:

- Please describe the bidder’s experience with helping to create, implement and evolve new programs, approaches, models and/or demonstration projects, particularly those where the parameters were not entirely pre-set and required creativity, innovation and refinement. Please include the details of the work undertaken, the bidder’s role, what innovation and evolution was required on the part of the bidder, the role of data and a brief summary of lessons learned.
- Please describe how bidder’s proposal is different from a traditional approach to services. Explain what the bidder hopes to gain or learn from the new program.

Plain language: Tell us about your experience and commitment to a learning and innovation approach:

- What are examples of new programs, approaches, projects that you’ve taken on where the parameters were not pre-set and required your creativity, innovation and refinement?
- How is your proposal different from a traditional approach? What do you have to gain or learn from this effort?

Scoring applicant responses

What we’re not looking for	What we’re looking for
<ul style="list-style-type: none"> • Only speaking to what’s laid out in the RFR/ parroting language. • No evidence of learning from past successes and failures. 	<ul style="list-style-type: none"> • Proposals that are testing and adopting new approaches outside of the organization’s current service scope. Examples of taking on “sacred cows” (approaches that have been in place for as long as anyone can remember) in their field or community. • Examples of prior innovations and adaptations where bidder actively participated in or led (not just implemented) community efforts for change and bringing peers along. • Comfort and ability to articulate how the program is different from bidder’s current approach and services, including an explicit statement of what the bidder hopes to gain from the new program.

B. Support a learning and innovation cohort.

❗ **Why this is important:**

This is a new way of working and understanding our systems. Not only will there be bidders from across the spectrum, but it is likely that awarded applicants will be at different points on their journey in using equitable access to wellbeing as a design principle. In awarding applicants, procuring agencies will be looking for both alignment and also interest in using this approach. If procuring agencies are serious about shifting towards more equitable systems, it means investing in a learning and innovation cohort (such as a Community of Practice) to support further integration of equitable access to wellbeing as a design principle in programs.

¹⁷ Hess, E. D. (2012, June 20). Creating an innovation culture: Accepting failure is necessary. Forbes. Retrieved June 10, 2022, from <https://www.forbes.com/sites/darden/2012/06/20/creating-an-innovation-culture-accepting-failure-is-necessary/?sh=4ec61d7a754e>

➡ **What procuring agencies need to allow or expect bidders to do:**

- Participate in a learning and innovation cohort led by the procuring agency or another designated facilitator.
- Request to be financially supported for participation in this learning and innovation cohort.
- Involve both direct service staff and also staff in a position to change structures or policies at the organization (leadership, managerial) in a learning and innovation cohort.

❓ **Questions bidders should answer:**

Formal language: Participation in a learning community is a required part of this grant. Please describe what the bidder hopes to learn or improve upon as part of the Community of Practice.

Informal language: Participating in a learning community is a required part of funding. What are you hoping to learn or improve as part of the Community of Practice?

Scoring applicant responses

What we're not looking for	What we're looking for
<ul style="list-style-type: none">• Responses do not go beyond what was stated in the RFR or on the scoring sheet.	<ul style="list-style-type: none">• Staff facilitate, rather than conduct, assessment (also known as "co-assessment").

C. Expect service plans to change, particularly in programs providing ongoing support (see Staff facilitate, rather than conduct, assessment (also known as "co-assessment") [page 14](#).



Important Considerations For The Procuring Agency Prior To Releasing An RFR

Making the RFR intentions clear

Include a section in the RFR on the intention of the procuring agency to increase equitable access to wellbeing.

ⓘ Why this is important:

In addition to what the procuring agency is looking for, the RFR should include a section that clearly states the intentions of this new RFR process. An RFR process that uses equitable access to wellbeing as a design principle will look different to bidders. They may attempt to respond in a way that they have in the past because of past expectations and experiences. Even if bidders are intentionally trying something innovative, they may cast that innovation as something standard for fear of not being funded. Bidders need clear signaling from the procuring agency that this is not business as usual and is a deliberate shift to support wellbeing and equity.

EXAMPLE: The City of New London included the following text in their RFR

The Federal American Rescue Plan Act (ARPA) is providing funding to New London and cities and states around the country. The purpose of the funds is to “respond to the far-reaching public health and negative economic impacts of the pandemic, by supporting the health of communities, and helping households, small businesses, impacted industries, nonprofits, and the public sector recover from economic impacts.” The Department of Human Services is in charge of ensuring a portion of these funds are used to address the emergency and system needs of our residents whose wellbeing has been most affected by the COVID-19 pandemic.

A reminder about our approach

Over time our social safety net has become increasingly focused on addressing problems with an often disconnected set of services. While good has been done, we have too often lost a focus on the whole human being we hoped to benefit. We also haven't always paid attention to equity. The progress people can make as a result of receiving services doesn't always add up to thriving, and our community is struggling. People need services, but adding more services alone won't help us see the whole person and help our neighbors build the capacity to lead lives that truly matter to them and the communities they call home. So with ARPA funds, we seek to move outside of the traditional service model to promote healing and access to wellbeing across New London. Neighbors helping neighbors, peer-support and other approaches are all of interest. Together, we have an opportunity to begin the life-changing work of organizing our social safety net not so much around problems but primarily on what drives all of us: the search for wellbeing.

This will take more than just human service programs. The work of wellbeing has implications for our infrastructure, for our schools, for how our neighborhoods are organized. But it can't happen unless the human service system is committed to working in a new way. So, we're stepping up to do our part.

We're so glad you share our commitment to using ARPA funds to continue to make transformative, systemic change in New London for our neighbors and our community.



RFR process and language to increase equity

Provide low-barrier extensions for those affected by declared disasters.

① Why this is important:

As climate and other large scale emergencies become more common, so too may related disruptions to workplaces, whether employees are onsite or remote, and to childcare. Events such as hurricanes and flooding impact communities of color and low-income people more frequently and/or with greater devastation. Spending on infrastructure and resiliency upgrades lag, and proximity to hazards such as chemical plants may be greater.¹⁸ The pandemic was a crisis-test of the effect on women's employment when childcare options weren't available and work expectations weren't flexible. Larger, better resourced entities are doubly protected. They may have greater redundancy in their workforce (e.g., an employee living/working in a non-affected community can take over preparation of the application/response), and they are more likely, due to sheer size, to have dedicated business/funding development staff who are themselves more likely to be more affluent and may be better protected from these disasters. We recommend low-barrier extensions of a fixed time – perhaps two to four weeks – on deadlines for applicants who are located in and serving an area that has a federal or state disaster declaration in place and whose entities are under a certain revenue threshold and/or employee size.

➔ What procuring agencies need to allow or expect bidders to do:

- Ask for extensions due to declared disasters.
- Be late if they are unable to communicate due to declared disasters. It may be the responsibility of the procuring agency to notify bidders of an extension for those who are located in and serving an area that has a federal or state disaster declaration in place.
- Allow intentional communication between procuring agency staff and applicants.

Allow intentional communication between procuring agency staff and applicants.

① Why this is important:

While requirements to limit communications between agency staff and applicants during the procurement process may be rooted in a value of fairness, they fail to acknowledge the importance of social networks in providing "shadow technical assistance." For example, if an application requires letters of support, an entity new to government contracting not connected to other entities who routinely contract with government might not know the norms for obtaining letters, and what letters are likely to carry weight in what circumstances. Individuals who are networked with others who may have this experience have an unfair advantage.

➔ What procuring agencies need to allow or expect bidders to do:

- Reach out to the procuring agency with questions about norms and what others typically do in these circumstances.
- Ask for help regarding what to emphasize or de-emphasize in their proposals.
- Require assistance regarding how to write grant proposals, which may be provided through examples of a generic application, generic letters of support, etc. so that it's clear what's expected.

¹⁸ Smith, N. (2020, March 18). There's no such thing as a natural disaster. Social Science Research Council. Retrieved June 10, 2022, from <https://items.ssrc.org/understanding-katrina/theres-no-such-thing-as-a-natural-disaster>

Use person-first language.

① Why this is important:

Labeling people by their issue triggers cognitive “othering,” reinforces the silos of our system and confuses the person with the issue identified. Agencies should use person-first language and reduce or eliminate the use of labels, even person-first ones (e.g., youth who have committed crimes), that reinforce the very identity everyone seeks to move beyond, particularly because these labels are applied disproportionately to people of color and reinforce false narratives that behaviors are concentrated in certain communities. For example, use “youth” instead of “juvenile offenders,” “kids” instead of “patients.”¹⁹

Describe inequities through a systems lens.

① Why this is important:

It is vital to pay attention to how structural inequities are discussed and described. Many attempts to describe inequities that are, for example, the result of systemic racism can actually reinforce mental models that differential outcomes are the result of the race of the person experiencing the intervention. The Perception Institute has generated resources and offers training to help policy makers and researchers navigate this terrain.

Use plain language.

① Why this is important:

The jargon of a field or policy limits potential bidders to those who are comfortable and familiar with the jargon. This excludes newer potential bidders or bidders who may be deeply tied into the community and are providing effective services, but have not been operating with the language of the field. Using plain language in the design of the RFR makes the RFR more accessible and more equitable.

When possible, eliminate expectations for literature review and footnotes.

① Why this is important:

A bidder’s ability to meet the objectives of the RFR does not necessarily rely on the ability to summarize research. Include expectations for literature review and heavily footnoted submissions only when absolutely necessary. While in some cases, the ability to execute a program or contract with the procuring agency may be related to the capacity to access and summarize academic research, often it is not, and so should not be included. That journal access is expensive and highly limited is a related, but separate concern.

➔ What procuring agencies need to allow or expect bidders to do:

- Use very few or no footnotes.

¹⁹ For more information, please see Wellbeing Blueprint recommendation 1.2.4: Use person-centered language in policy and practice (<https://wellbeingblueprint.org/blueprint>).

Data and payment expectations.

Outcomes are based on wellbeing, not just one outcome: pay-for-performance.

① Why this is important:

While services and supports can and should certainly focus their efforts, durable change requires that change be relevant to the person making the change and not come with unsustainable tradeoffs. Funder focuses have a profound influence on organizational priorities, processes and behavior. When funders emphasize the number of people who have been moved into housing, for example, then program priorities are on moving people into housing, at all costs. This may mean disregarding or downplaying unsustainable tradeoffs experienced by participants that ultimately result in less access to wellbeing.

To encourage a focus on wellbeing, procurement should set up a pay-for-performance model that optimizes wellbeing, not just one outcome that forces unsustainable tradeoffs. Procuring agencies should consider pay-for-performance contracts that incentivize outcomes in a given area of focus (e.g. housing stability) that do not come at the expense of progress or assets in other domains. "While services and supports can and should certainly focus their efforts, durable change requires that change be relevant to the person making the change and not come with unsustainable tradeoffs. Pay-for-performance and pay-for-success contracts or bonds in human services, or value-based contracting in healthcare, are several examples of where this (i.e., starting with people's goals and optimizing wellbeing, not one outcome) should be applied."²⁰

➔ What procuring agencies need to allow or expect bidders to do:

- Set individualized wellbeing outcomes for participants.
- Track tradeoffs as a part of any steps taken together.
- Recognize that participant outcomes may evolve. Participants' goals and ideas of success within the domains are drivers of program outcomes and may change as priorities and life circumstances change.

Collect data based on tradeoffs as it related to system barriers.

① Why this is important:

Because of the aforementioned system defaults, many of the policies, structures and processes currently in place force tradeoffs for participants. If we are interested in shifting towards a system that allows for equitable access to wellbeing, we need to be able to identify which policies, structures and processes need to change or be ameliorated through additional policies, structures and processes.

Organizations need the support of the procuring agency in order to do this. Organizations often look to procuring agencies for direction on what kinds of data to collect and they may be especially hesitant to create tools that are tracking systemic forces which may implicate the procuring agency's policies and processes, as well as their own. For this reason, the procuring agency is best positioned to create a tool for tracking system barriers, as well as incentivizing and paying for gathering and using the resulting data.

²⁰ For more information, please see Wellbeing Blueprint recommendation 1.4.2: Pay for performance that optimizes wellbeing, not just one outcome (<https://wellbeingblueprint.org/blueprint>).

➔ What procuring agencies need to allow or expect bidders to do:

- Allocate funding and time to transition to a new way of collecting data. The collection and analysis of data will need to be financially supported as well.
- Ultimately, the procuring agency should expect systemic barrier data to be collected in MIS systems and analyzed regularly.
- Collect data on how flex funds are spent as well as the impact and rationale behind the spending of the flex funds. Programs should not be discouraged from identifying systemic barriers that originate from the municipal, state or federal levels.
- Describe data collection expectations of the tradeoffs that people experience in order to participate in activities, events, programming, etc.

Consider which proposals to fund

Prioritize organizations submitting letters of support with non-traditional entities.

ⓘ Why this is important:

Please see Principle #3: Leverage community assets, not just programs, Element A: Position the program as adding to what exists in the community, not replacing it, [page 18](#).

Be open to non-traditional programming: arts and culture.

ⓘ Why this is important:

Arts and culture are valuable in community assessment, design and change processes, and can be core to our drive for wellbeing. Arts and artistic expression make us human, but are often treated as “extra” in lower-income communities – even though artists are in every community. The arts heal, distract, connect, amplify and more. Traditional community processes that center on creating written reports and action plans often leave out whole dimensions of the human experience and community members who will be instrumental in driving and supporting that change.²¹

While it is not essential that every bidder includes arts and culture, arts and culture is essential to shifting towards equitable access to wellbeing. Although human services have traditionally included art and culture insofar as they relate to therapy, human services programming has not traditionally included arts and culture as a focus point in other contexts. Procuring agencies are critical in signaling openness and acceptance of innovative approaches to human services. This may include projects such as using art to:

- Articulate assets and strengths of a community.²²
- Express community narratives and history.²³
- Describe the challenges and tradeoffs facing communities.²⁴
- Bring access to technology through digital art.²⁵
- Build skills through creative writing.²⁶
- and much more.

²¹ For more information, please see Wellbeing Blueprint recommendation 5.1.1: Include arts and culture in community assessment, design and change processes (<https://wellbeingblueprint.org/blueprint>).

²² Please see this example: Map of Skid Row in Los Angeles, CA that shows arts and activities free to the community (<https://www.lapovertydept.org/skid-row-arts-map>)

²³ Please see these two examples of organizations that are using art to express community narratives and history: Expressiones (<https://www.expressions.org/>) and The Avenue Concept (<https://theavenueconcept.org/about>).

²⁴ Please see this example of a zoning-themed mini-golf course to articulate housing issues: (<https://www.lapovertydept.org/wordpress/wp-content/uploads/2005/05/2017-LAist-Julia-Wick-Photos-This-Zoning-Themed-Mini-Golf-Course-Tackles-Housing-Issues-In-L.A.-LAist.pdf>).

²⁵ Please see this example of an organization that is bringing access to technology through digital art: Bridge Builder Arts (<https://www.bridgebuilderarts.org>).

²⁶ Please see this example of an organization that is bringing skills through creative writing: 826 Valencia (<https://826valencia.org>)

Moving towards equity and wellbeing means moving towards communication and expression that are not solely based on written reports and action plans. Involving arts and culture allows programming, program evaluation, etc. to be more inclusive and impactful. Shifting away from inequitable system defaults necessarily requires innovation. However, organizations may base their applications on what they think is acceptable or not acceptable to procuring agencies. As such, the procuring agency must explicitly signal that proposals focusing on arts and culture will be accepted.

➔ What procuring agencies need to allow or expect bidders to do:

- Include art and culture as a key component, or the only component, in their proposals.
- Submit proposals that do not depend solely on a written component. Consider allowing videos, audio recordings, artistic answers to questions, etc.

Include revamping documents to be more accessible to be an allowable expense.

① Why this is important:

The traditional approach often creates documents that are full of jargon and inaccessible to program participants. To truly “design with, not for,” may require spending on the revamping of documents to be more user-friendly and use plain language. Rewriting and reconfiguring documents, forms and other materials should be an allowable program (versus administrative) expense when conducted in conjunction with end-users. As an example of this shift, “before and after” images of forms from the St. Louis County Family Court are included on [page six of this systems change profile](#).

➔ What procuring agencies need to allow or expect bidders to do:

- Budget for the revamp of documents, forms and more to be more user-friendly and use plain language.
- Budget for paying for the expertise of end-users (who may be participants) in the revamp of documents, forms, etc.

Commitment to only fund bidders who demonstrate interest in moving towards systems that support equitable access to wellbeing.

① Why this is important:

A procurement designed to increase equitable access to wellbeing is only effective insofar as it resources organizations and programming that follow guidelines and expectations related to using equitable access to wellbeing as a design principle. This approach will be new to many bidders. While bidders’ structures and practices may be on a spectrum with regard to currently reflecting equitable access to wellbeing as a design principle, what is essential is an interest in moving towards systems that support equitable access to wellbeing. Holding this as critical and then supporting organizations in moving further along the spectrum will be key to shifting away from system defaults.

➔ What procuring agencies need to allow or expect bidders to do:

- Be surprised if they have been funded in the past and are not funded this time.
- Use their connections to pressure the procuring agency into funding their programs.



A New Kind of Bidders' Conference

An RFR that focuses on wellbeing will be different from a traditional RFR. For that reason, the bidders' conference needs to be more than simply a place to ask questions; it also needs to serve as an education vehicle that can speak to various learning styles, not assuming that everyone will be able to understand expectations simply from reading the RFR. Even if they're carrying out innovative programming, traditional RFRs have trained bidders to respond to what they believe funders expect them to do.

Historically, in order to obtain funding, bidders have been trained to tell the story of how their service population is broken and their services single-handedly have fixed the people's problems. This is exactly the opposite of the story they should be telling from a wellbeing-orientation perspective.

Instead, bidders need to tell the story of how they will support and leverage the great work that's already happening outside of their organization and that participants are already doing. And, they need to describe how participants are leading not just in their own goals, but in the organization, as well.

Historical thinking is very entrenched and concerns of not being awarded grant funding with a different story will keep old patterns of thinking in place. It will require a new kind of bidder's conference to shift how things have always been done into a new way of doing.

What to include in a bidders' conference:

- An explanation of how this procurement process is shifting and why this shift is taking place.
- A brief explanation of tradeoffs and the Five Domains of Wellbeing since they are key to shifting towards systems that support equitable access to wellbeing.
- A clear articulation of what the procuring agency is looking for in a proposal – not just things like page length, but also what is being sought in terms of using equitable access to wellbeing as a design principle, such as describing inequities through a systems lens, leveraging community assets, etc.
- A copy of the scoring rubric for transparency (see Scoring Rubrics, [page 40](#)). This will be new to bidders, so knowing what the expectations are will help encourage the development of aligned programs.
- A description of any learning community expectations.
- A spacious timeline. Be sure to include extra time between the bidder's conference and the proposal due date. With this being a new approach, questions will surely arise.

Materials

Example Applicant Training for Toolkit: [Example Applicant Training for Toolkit.pptx](#)

Video to illustrate the connection between equity and wellbeing: <https://bit.ly/Fairshot>

Video to explain tradeoffs: <https://bit.ly/3wlbYng>

Video to explain the Five Domains of Wellbeing: <https://bit.ly/39JenGE>



Reviewing Proposals

An RFR that focuses on wellbeing will be different from a traditional RFR not just in terms of what is in the RFR, but also in how reviewing proposals is carried out. There are shifts that need to happen in at least four areas:

1. Creating review teams that include diverse perspectives.
2. A more equitable reviewing process that works against biases all human beings have.
3. Special training for all reviewers and especially for reviewers who are used to reviewing proposals that reflect a traditional approach.
4. Scoring rubrics that have more detail than usual to support reviewers who may be new to scoring RFRs that reflect using equitable access to wellbeing as a design principle.

Review teams

A variety of perspectives can help to improve cross-agency work and also ensure that application qualities are not missed. Additionally, there are a number of precautionary measures that may be taken to work against biases that are inherent in all of us.

When considering whom to include on review teams, consider including:

- People from agencies who also work with the same population.
- People from agencies who are tangentially connected to the work.
- People who reflect the service population.

If the procuring agency is soliciting advisors or reviewers who are not compensated for this work through their regular employment, budget to compensate them for their work. Efforts should also be made to buffer these individuals from payments triggering the benefits cliff (e.g., because of getting paid, this person no longer qualifies for utilities assistance or SNAP benefits that are necessary).

Review process to work against bias

All human beings have biases built into the way that we think. However, there are steps that can be taken to work against these biases to make the review process more equitable.

Remove identifying information. Consider blinded review for relevant portions of responses and applications. Affiliation bias (the confluence of positive regard on an individual or institution based on their observed or stated affiliation with a well-regarded and better known individual or institution) favors those who already have connections, not unlike legacy admissions to elite schools. Blind review, such as practiced at the National Institutes of Health, is not a panacea, but can be valuable when used to assess the idea or concept or product proposed (versus the applicant's capacity to execute).

Use three reviewers for each proposal. Each person will carry a unique set of implicit biases that can be mitigated through using a group of reviewers. Rather than going with what one person thinks, using the wisdom of the crowd can increase the quality of the decision. Evidence suggests that the benefit of multiple reviewers is maximized at three reviewers.²⁷

All-at-once scoring reveal. Share scores simultaneously so that reviewers aren't swayed by the group or influenced by reviewers with more positional power.

²⁷ Michel, A. (2016, December 30). Harnessing the wisdom of crowds to improve hiring. Association for Psychological Science - APS. Retrieved June 10, 2022, from <https://www.psychologicalscience.org/observer/harnessing-the-wisdom-of-crowds-to-improve-hiring>

Reviewer training

With a wellbeing-oriented procurement, what is being scored will be different than a traditional procurement. Reviewers have been traditionally trained to look for qualities that may be the opposite of what is desired when using equitable access to wellbeing as a design principle. To work against the natural tendency to value the status quo (system defaults), include in the training:

- An explanation of how these shifts in procurement are contributing to increased equity and wellbeing.
- An illustration of the underlying systems assumptions that the procurement agency is looking to shift through the RFR.
- A brief explanation of tradeoffs and the Five Domains of Wellbeing since they are key to shifting towards systems that support equitable access to wellbeing.
- Clear articulation of the main differences between what is traditionally valued and what is being sought in a procurement process that uses equitable access to wellbeing as a design principle.

Materials

Example training slides: [Reviewers Training for Toolkit.pptx](#)

Video to illustrate the connection between equity and wellbeing: <https://bit.ly/Fairshot>

Video to explain tradeoffs: <https://bit.ly/3wlbYng>

Video to explain the Five Domains of Wellbeing: <https://bit.ly/39JenGE>

Scoring rubrics

With a wellbeing-oriented procurement, what is being scored will be different than a traditional procurement. While reviewers will have gone through training to support them in identifying what's necessary for shifting towards equitable access to wellbeing, a scoring rubric that contains additional detail will be invaluable for reference. Additionally, scoring through a rubric will work against the biases human brains take to spotlight one piece of information and extrapolate that impression to the rest of the proposal. It will also prevent reviewers from being swayed by writing ability when it is not essential to service delivery.

Example: Example scoring sheet for Procurement Toolkit.docx

Appendix



Questions for Bidders

The questions below correspond to the principles in this toolkit for using equitable access to wellbeing as a design principle. For each question, there are examples for how to express the questions formally or with plain language. Please think of these as sample language – you may need to adjust the questions to better fit your process.

1. Formal language: The bidder shall provide a brief narrative of its organization, including subcontractors and mission, that specifically addresses how the organization’s mission relates to the scope of work expected of the bidder. This must include the organizational values and philosophical approach to serving the intended population and how this approach aligns with the program being proposed.

Plain language: How is your mission aligned with what we hope to accomplish with this procurement? Tell us about how you make your values “real” for the people this project/program is intended to support.

In support of: **Principle #5: Recognize that systems are part of the problem, Element A: Interest in addressing systemic barriers and inequities, not just getting better at fixing people**

2. Formal language: Please describe how the bidder’s knowledge of social forces such as racism informs their approach, and how a racial equity and social justice lens is incorporated into programming. Explain how this project contributes to addressing the systems-related challenges individuals face. Please describe the bidder’s cultural humility and accessibility as an organization, inclusive of how those values are translated to staff, and a sensitivity to values, beliefs and needs that are associated with a person’s age, physical or mental ability, gender identity, sexual orientation, racial, ethnic, religious or cultural background.

Plain language: Tell us about how you’re addressing inequities. How does this effort address inequities and racism? How does your project direct as much funding as possible to the communities hardest hit? How do you increase accessibility for people with disabilities or limited mobility, those with no or limited English proficiency, and those who are undocumented? How do you support staff in addressing inequities and racism?

In support of: **Principle #5: Recognize that systems are part of the problem, Element A: Interest in addressing systemic barriers and inequities, not just getting better at fixing people**

3. Formal language: Please describe the bidder’s experience and approach to including community members or participants in key roles of the organization or in program design and how the bidder has prepared and supported participants to be advocates/activists, not just service recipients. Describe how staff reflect the community and measures taken to ensure that community members are able to participate in program design, including measures such as budgeting for community member compensation or removal of requirements to consider criminal records as an immediate disqualification to hiring.

Plain language: Tell us about your experience including community members or participants and how your idea is centered on the needs and demands of the community, and who will participate in this project. What was the role of the community in shaping this idea? How do you tap participants’ and residents’ expertise, and how are they involved in the implementation of the project?

In support of: **Principle #2: Design with, not for, Element B: Participants create value and have voice, Element C: Ensure staffing reflects the community participating in the program**

4. Formal language: Please describe the bidder’s approach and experience providing services and supports that are person-centered, build on participants’ assets, address the tradeoffs of change, and incorporate participant voice and input into program design and implementation. Please describe where the bidder is not as strong in this regard as well.

Plain language: Tell us about your experience and approach in providing services and supports that are person-centered, build on strengths and address the tradeoffs of change. How do you involve participants in program design and implementation? Where do you struggle with this?

In support of: **Principle #1: Start with wellbeing, Element B: Focus assessment on wellbeing, Principle #2: Design with, not for, Element A: Staff facilitate, rather than conduct, assessment (also known as “co-assessment”), Element B: Participants create value and have voice**

5. Formal language: Please describe the bidder’s approach to participant eligibility requirements; how potentially eligible participants will be identified; how programs will be accessible for people with disabilities or limited mobility and those with no or limited English proficiency; creative outreach to those for whom the issue area (domestic violence, homelessness, substance use, etc.) is not the dominant identity; and creative solutions to managing caseloads and balancing open eligibility with limited resources without instituting inflexible termination policies.

Plain language: Tell us about your eligibility requirements and process. How do you determine eligibility? How do you increase accessibility for people with disabilities or limited mobility, those with no or limited English proficiency, and those who are undocumented? How do you creatively reach out to people who might not self-identify as (survivor, homeless, substance user, etc.)? How do you balance being accessible to most people while having limited resources and trying to limit termination policies?

In support of: **Principle #1: Start with Wellbeing, Element A: Eligibility criteria designed to “screen in”**

6. Formal language: Please describe the bidder’s assessment process and who leads the assessment and decisions about what steps to take. How does the bidder integrate wellbeing into their assessment process? How do participants’ understanding of their situations, which typically change over time, factor into assessment and progress planning? How does the program address situations where staff and participants disagree on the path forward?

Plain language: Tell us about your assessment process. How does it incorporate wellbeing? Who leads the assessment and decides on what steps to take? How does your process take into account the reality that participants’ understanding of what’s going on changes over time? What do you do when staff and participants disagree on the path forward?

In support of: **Principle #2: Design with, not for, Element A: Staff facilitate, rather than conduct, assessment (co-assessment)**

7. Formal language: Please describe the bidder’s experience working with program participants to identify, enhance and leverage participants’ social connections, networks and community outside and beyond the parameters of program staff and other participants. This includes supporting social connections not directly connected with participants’ issue area(s), such as supporting social connections related to hobbies and other interests, as well as social connections that are “imperfect” and bring challenges. Please include specific activities, exercises and strategies tried and employed, and lessons learned.

Plain language: Tell us about how you build and leverage social connections outside of programs. How do you go about identifying social connections, networks and community beyond the program? How do they get strengthened and built upon? This can include social connections related to hobbies and other interests, as well as social connections that are “imperfect” and bring challenges. What activities, exercises and strategies have you used? What lessons have you learned?

In support of: **Principle #1: Start with Wellbeing, Element C: Leverage existing social networks and build new social networks, Principle 3: Leverage community assets, not just programs, Element A: Position the program as adding to what exists in the community, not replacing it**

8. Formal language: Provide examples of how your organization has identified, cultivated and leveraged relationships with informal resources, community resources and non-traditional partners, outside the realm of professionalized services or providers. Additionally, explain how your organization contributes to the community outside of services (for example, being a resource to other groups) and how you have leveraged organizational affiliates' (board, staff, etc.) social networks to support the group of participants or individual participants.

Plain language: Tell us about your relationship with the community and your experience operating outside of professional services. How has your organization developed relationships with those outside of professionalized services or providers? This can include informal resources, community resources and non-traditional partners like pet sitters, barbershops, mechanics, etc. How does your organization support the community? How have you allowed organizational affiliates (board, staff, etc.) to use their social networks to support a group of participants or an individual participant?

In support of: **Principle #1: Start with wellbeing, Element D: Allow organizational affiliates (staff, Board and others) to leverage their own social networks, Principle 3: Leverage community assets, not just programs, Element A: Position the program as adding to what exists in the community, not replacing it**

9. Formal language: Describe the bidder's plan for using flex funds in order to support participants and the organization in doing what may not otherwise be possible. Explain how flex funds will be available quickly with accountability and flexibility, given limited flex funding.

Plain language: Tell us about how you plan to use flex funds. What do you anticipate flex funds will allow your participants and your project to do that aren't otherwise possible? How do you plan to approach using flex funds to ensure that they are available quickly, accountably and flexibly, given that these are finite resources?

In support of: **Principle #4: Support people in getting what they need and want; don't just help them manage what they don't have, Element A: Require use of flex funds**

10. Formal language: Describe the bidder's experience and commitment to a learning and innovation approach:

- Please describe the bidder's experience with helping to create, implement and evolve new programs, approaches, models and/or demonstration projects, particularly those where the parameters were not entirely pre-set and required creativity, innovation and refinement. Please include the details of the work undertaken, the bidder's role, what innovation and evolution was required on the part of the bidder, the role of data and a brief summary of lessons learned.
- Please describe how the bidder's proposal is different from a traditional approach to services. Explain what the bidder hopes to gain or learn from the new program.
- Participation in a learning community is a required part of this grant. Please describe what the bidder hopes to learn or improve upon as part of the Community of Practice.

Plain language: Tell us about your experience and commitment to a learning and innovation approach:

- What are examples of new programs, approaches or projects that you've taken on where the parameters were not pre-set and required your creativity, innovation and refinement?
- How is your proposal different from a traditional approach? What do you have to gain or learn from this effort?
- If relevant: Participating in a learning community is a required part of funding. What are you hoping to learn or improve as part of the Community of Practice?

In support of: **Principle #6: Expect learning and evolution; Element A: Prioritize organizations and leadership that take a learning and innovation approach; Element B: Support a learning and innovation cohort**



Procurement Using Equitable Access to Wellbeing as a Design Principle

Principle 1: Start with wellbeing.

- Eligibility criteria designed to “screen in.”
- Focus assessment on wellbeing.
- Leverage existing social networks and build new social networks.
- Allow organizational affiliates (staff, Board and others) to leverage their own social networks.

Principle 2: Design with, not for.

- Staff facilitate, rather than conduct, assessment (also known as “co-assessment”).
- Participants create value and have voice.
- Ensure staffing reflects the community participating in the program.

Principle 3: Leverage community assets, not just programs.

- Position the program as adding to what exists in the community, not replacing it.
- Leverage social connections.

Principle 4: Support people in getting what they need and want; don't just help them manage what they don't have.

- Require use of flex funds.

Principle 5: Recognize that systems are part of the problem.

- Have an interest in addressing systemic barriers and inequities, not just getting better at fixing people.

Principle 6: Expect learning and evolution.

- Prioritize organizations and leadership that take a learning and innovation approach.
- Support a learning and innovation cohort.
- Expect service plans to change, particularly in programs providing ongoing support.



Scoring Guide Cheat Sheet

Principle 1: Start with wellbeing.

Eligibility criteria designed to “screen in”

What we’re looking for

- Experience creating an inclusive environment for people with disabilities; people with limited or no English proficiency; people with a variety of religious and spiritual practices; and other barriers to services.
- Creative outreach and partnerships to reach those for whom (survivor, homelessness, substance use) isn’t their dominant identity.
- Commitment to serving those who are ineligible for other programs, as demonstrated through few eligibility requirements and few termination policies.

Focus assessment on wellbeing

What we’re looking for

[\(See Principle 2: Design with, not for\)](#)

Leverage existing social networks and build new social networks

What we’re looking for

- Strategies that strengthen existing social networks, such as supporting participants in navigating less-than-perfect relationships, paying for transportation and/or phone access to connect with friends and relatives, and supporting people in maintaining commitments to others.
- Policies that don’t limit or prohibit contact with certain people or connections.
- Strategies to build new social networks that speak to the range of identities a participant has (e.g., religion, in recovery, gardener), not just the program identity (e.g., survivor). This includes activities such as helping to pay for tickets or entry to events with like-minded people (e.g., a film festival or gaming conference), or warm hand-offs to social clubs, local associations, networking groups or faith communities.
- Policies that allow for participants to define “family” and include support, programming and activities for extended family members and friends.

Allow organizational affiliates (staff, board and others) to leverage their own social networks

What we're looking for
<ul style="list-style-type: none">• Concrete examples of previous instances of leveraging social networks of organizational affiliates.• Discussion of holding the productive tension between professional boundaries and the wellbeing benefits to participants.

Principle 2: Design with, not for.

Staff facilitate, rather than conduct, assessment (also known as "co-assessment")

What we're looking for
<ul style="list-style-type: none">• Language that demonstrates partnership with the participant. Participants have complete access to their files and information about them, and they determine what, how much, when, for how long and with whom their information is shared.• Assessment is bi-directional, participant-driven and changing/fluid: focuses on a relationship where both parties influence each other's thinking but where the person whose situation is being co-assessed is seen as the ultimate expert. Alignment and difference in perspective are explored, not squelched. How we understand ourselves can shift.• Indication that the participant is a whole person with assets, relationships, interests as well as needs and challenges (e.g., what matters to you?). Focuses on what's going well and what has worked in the past.• Tradeoffs are explored at every step and there is recognition that all change creates tradeoffs (e.g., increasing safety by leaving a gang may decrease safety on the streets. Increasing safety may decrease stability or social connectedness).

Participants create value and have voice

What we're looking for
<ul style="list-style-type: none">• Opportunities for participants to lead or co-lead activities and help other participants navigate dynamics.• Participants in key organizational roles, such as on the Board, hired as consultants, training others, program development teams, policy review committees, etc.• Incorporation of participants and community members in program design, such as evidence that participant voice and input was part of creating the proposal or examples of when a substantive change in philosophy, practice or policy has been made in response to participants' voices.• Supporting participants to be advocates/activists, not just service recipients. Activities designed to raise participants' and public awareness and consciousness.

Ensure staffing reflects the community participating in the program

What we're looking for
<ul style="list-style-type: none">• Hiring strategies that prioritize resonance with organizational values, ethical fiber and personal desire to grow, as well as professional expertise (through personal experience or training) and ability to tolerate ambiguity.• Requirements that do not consider criminal records as an immediate disqualification to hiring.• Staff represent the communities served or have used the services themselves.• Budgets include compensation reserved for participants and community members for their work.

Principle 3: Leverage community assets, not just programs.

Position the program as adding to what exists in the community, not replacing it

What we're looking for

- A history of non-traditional partnerships, not just stated intent. This should be expressed through examples of how the bidder cannot do their work without community partners and/or examples of a problem or challenge that was solved (at least in part) by leveraging non-professionalized services (e.g., referring a participant to a car mechanic that allows for partial payment over time).
- Examples of community knowledge only available to those actually rooted in community, such as knowing where in the community people gather or knowing informal community leaders (not service providers).
- Examples of how the bidder's organization is an informal resource to its community (e.g., provides space after-hours to groups).

Leverage social connections

What we're looking for

[\(See Principle 1: Leverage existing social networks and build new social networks\)](#)

Principle 4: Support people in getting what they need and want; don't just help them manage what they don't have.

Require use of flex funds

What we're looking for

- Flex funds are meeting emergent needs and addressing the unsustainable tradeoffs experienced by participants.
- Flex funds are made available quickly and simply.
- Program articulates what flex funds would allow participants and the program to do that wouldn't be otherwise possible.

Principle 5: Recognize that systems are part of the problem.

Have an interest in addressing systemic barriers and inequities, not just getting better at fixing people

What we're looking for

- Examples of how the bidder has made changes to practices and policies as a result of increased attention to racial and other equity (e.g., "we used to...now we...")
- Description of the core issues the bidder works on (violence, eviction, homelessness, public benefits, etc.) references social and environmental context (e.g., the City of X has only added 200 affordable housing units over the last five years, even as the population has increased by 10,000. As a result, the waiting list for housing has ballooned to 2,500 families, many of whom are now homeless.)
- Organizational resources directed to staff training, organizational development and coaching in diversity, equity and inclusion.

Principle 6: Expect learning and evolution.

Prioritize organizations and leadership that take a learning and innovation approach

What we're looking for

- Proposals that are testing and adopting new approaches outside of the organization's current service scope. Examples of taking on "sacred cows" (approaches that have been in place for as long as anyone can remember) in their field or community.
- Examples of prior innovations and adaptations where bidder actively participated in or led (not just implemented) community efforts for change and bringing peers along.
- Comfort and ability to articulate how the program is different from bidder's current approach and services, including an explicit statement of what the bidder hopes to gain from the new program.

Support a learning and innovation cohort

What we're looking for

- Anticipation that the learning speaks to the transformational aspirations of the procuring agency.

Expect service plans to change, particular in programs providing ongoing support

What we're looking for

[\(See Principle 2: Staff facilitate, rather than conduct, assessment \(also known as "co-assessment"\)\)](#)



RFR Process Self-Assessment

Making the RFR intentions clear

- Yes No Did we add a section to the RFR that explicitly explains the intention of the procuring agency to increase access to wellbeing through this RFR?

RFR process and language to increase equity

- Yes No Are we allowing for low-barrier extensions for those affected by declared disasters?
 Yes No Are we allowing for intentional communication between procuring agency staff and applicants?
 Yes No Are we using person-first language?
 Yes No Are we describing inequities through a systems lens?
 Yes No Are we using plain language?
 Yes No Have we eliminated expectations for literature review and footnotes?

Data and payment expectations

- Yes No Are our outcome expectations based on wellbeing (not just one outcome)?
 Yes No Are we asking awarded bidders to collect data based on tradeoffs related to systems barriers?

Considering which proposals to fund

- Yes No Are we prioritizing organizations that submit letters of support with non-traditional entities?
 Yes No Are we open to non-traditional programming such as the arts and culture?
 Yes No Are we allowing revamping documents to be more accessible as an allowable expense?
 Yes No Are we committed to only fund bidders who demonstrate interest in moving towards systems that support equitable access to wellbeing?

Principles to include in the RFR

Principle 1: Start with wellbeing

- Yes No Eligibility criteria designed to “screen in”
 Yes No Focus assessment on wellbeing
 Yes No Leverage existing social networks and build new social networks
 Yes No Allow organizational affiliates (staff, board and others) to leverage their own social networks

Principle 2: Design with, not for

- Yes No Staff facilitate, rather than conduct, assessment (also known as “co-assessment”)
 Yes No Participants create value and have voice
 Yes No Ensure staffing reflects the community participating in the program

Principle 3: Leverage community assets, not just programs

- Yes No Position the program as adding to what exists in the community, not replacing it
 Yes No Leveraging social connections

Principle 4: Have an interest in addressing systemic barriers and inequities, not just getting better at fixing people

Yes No Require use of flex funds

Principle 5: Recognize that systems are part of the problem

Yes No Interest in addressing systemic barriers and inequities, not just getting better at fixing people

Principle 6: Expect learning and evolution

Yes No Prioritize organizations and leadership that take a learning and innovation approach

Yes No Support a learning and innovation cohort

Yes No Expect service plans to change, particularly in programs providing ongoing support

A new kind of bidder's conference

Yes No Did we include how this procurement process is shifting and why this shift is taking place?

Yes No Have we included a brief explanation of tradeoffs and the Five Domains of Wellbeing?

Yes No Did we clearly articulate what is expected in terms of using equitable access to wellbeing as a design principle? (such as describing inequities through a systems lens or leveraging community assets, etc.)

Yes No Did we include a scoring rubric for transparency?

Yes No Did we include any learning community expectations?

Yes No Is our RFR timeline spacious enough to accommodate new questions about this new process?

Review team

Yes No Does our review team consist of people from agencies who also work with the same population, people from agencies who are tangentially connected to the work, or people who reflect the service population?

Yes No Have we budgeted to compensate reviewers who are not being compensated through their regular employment, paying attention to the benefits cliff?

Review process

Yes No Have we removed identifying information?

Yes No Do we have three reviewers for each proposal?

Yes No Are we revealing each reviewer's scoring at the same time?

Reviewer training

Yes No Have we included an explanation of how these shifts in procurement are contributing to increased equity and wellbeing?

Yes No Are we articulating the underlying systems assumptions that we are hoping to shift with this RFR process?

Yes No Have we included a brief explanation of tradeoffs and the Five Domains of Wellbeing?

Yes No Have we clearly articulated the main differences between what is traditional valued and what is being sought in a procurement process that uses equitable access to wellbeing as a design principle?

Scoring rubrics

Yes No Do our scoring rubrics include details on what to look for in a grant proposal?



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The Full Frame Initiative is a social change organization that partners with a growing cohort of pioneering organizations, systems and communities across the country to fundamentally shift their focus from fixing problems to fostering wellbeing – the needs and experiences essential for health and hope. Together, we are creating possibilities for lasting change in people’s lives and sparking a broader movement that replaces poverty, violence, trauma and oppression with wellbeing and justice.

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