



## Request for Proposal for Diversity, Equity and Inclusion Facilitation & Planning

The San Antonio Area Foundation (SAAFdn) is the community foundation serving the San Antonio Area for more than 50 years. The Area Foundation helps donors achieve their charitable goals and serves as a collaborative leader by bringing people together to address key community issues. Since 1964, SAAFdn has awarded \$305 million in scholarships and grants to nonprofits that provide a variety of services enhancing the quality of life in our region. Currently, SAAFdn manages 500 charitable funds of \$901 million in assets.

SAAFdn seeks a strategic consultant or consulting team that will guide a group of internal and community stakeholders to develop a multi-year plan that advances diversity, equity and inclusion (DEI) through effective community outreach and impactful community philanthropy.

### Background

On March 24, 2016, the Executive Committee of SAAFdn's Board of Directors approved the engagement of a strategic consultant to assist SAAFdn in developing a multi-year plan for "inclusive philanthropy"<sup>1</sup> and included the contributions of its community outreach funds<sup>2</sup>. An ad hoc **Inclusive Philanthropy Taskforce (IPT)**, authorized by SAAFdn's President/CEO and co-chaired by two SAAFdn Board Members, has been established to select the consultant and oversee the planning process. Additional IPT members include representatives of SAAFdn's three community outreach funds, SAAFdn staff, and local diversity professionals.

The IPT's forthcoming planning in diversity, equity and inclusion (DEI) builds upon related milestones in SAAFdn's executive leadership, community philanthropy and core values development. They include the:

1. Recruitment and successful tenure of Clarence "Reggie" Williams, Colonel, USAF (Ret.) as President/CEO of the Area Foundation (2000-11). Mr. Williams became the first person of color to lead the foundation, doubling its assets from 101M to 223M; increasing giving from 7.5M to 12.2M per annum; and overseeing multi-stakeholder initiatives in military/veteran support, animal care, education, and nonprofit support services. Mr. Williams managed SAAFdn's growth from 11 to 31 employees.
2. Establishment of three community outreach funds to increase the involvement of under-represented communities in institutional philanthropy (2007-09). SAAFdn provided seed funding and staff support, and local civic leaders were recruited to direct and grow the funds' resources, community engagement and grantmaking to nonprofits serving their stakeholder communities. In recent years, SAAFdn modified its business relationship with its outreach funds, prompting a renewed commitment by all parties to re-imagine next-level community philanthropy through a facilitated planning process.
3. Development, shared ownership and visibility of the Area Foundation's core values: integrity, teamwork, innovation, and service (2011). Initiated under current President/CEO Dennis Noll, the articulation of SAAFdn's core values provide a common vocabulary, purpose and accountability for striving to be a more diverse, equitable and inclusive organization.

SAAFdn recognizes that its constituencies, from its staff to the community it serves to its partners in philanthropy, are becoming increasingly diverse. SAAFdn is dedicated to deepening and broadening its donor relationships, increasing community engagement and impact, and empowering its employees to provide better service to new and diverse stakeholders. This 6-month initiative centers on strengthening SAAFdn's community outreach funds as "phase one"; SAAFdn anticipates that additional pathways for inclusive philanthropy will emerge from this work.

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<sup>1</sup> SAAFdn defines inclusive philanthropy as incorporating a full range of policies and practices to ensure the active participation of diverse perspectives and people in the charitable mission, programs and plans of organizations serving the common good. (See [d5coalition.org](http://d5coalition.org) for additional resources.)

<sup>2</sup> SAAFdn's community outreach funds are also referred to as "population-focused funds". They include the South Texas Hispanic Fund, S.A. Area African American Fund, and Women & Girls Development Fund. (See *Population-Focused Funds: Positioning for the Future*, The Bridgespan Group, Feb. 2014.)

## Scope of Work

The Inclusive Philanthropy Taskforce (IPT) expects to begin this project at the beginning of July 2016 and conclude its work by the end of December 2016. The IPT seeks an experienced consultant who can:

- Provide stakeholders (representatives of outreach funds, SAAFdn, community members) with an introductory overview of shared DEI terminology, cultural competency, and the roles, responsibilities and opportunities to deepen and broaden donor relationships and community engagement.
- Gather, analyze and share data and best practices on successful community outreach funds, community philanthropy and the engagement of diverse donors. Provide information and analysis from the field of community foundations, the San Antonio/Texas region, and internal SAAFdn data.
- Facilitate strategic conversations for and between stakeholders to consider cultural differences, best practices and new approaches for effective community philanthropy. Drive clarification for stakeholders of the distinct and shared goals, strategies and resources of the community outreach funds and SAAFdn to leverage charitable investments and address community needs.
- Guide the development of a blueprint for inclusive philanthropy that evaluates, updates and strengthens the efforts of and support for each community outreach fund to increase the involvement of underrepresented communities in the Area Foundation's philanthropy. The plan should:
  - Reflect the time, talent and treasure of outreach fund volunteers, as well as potential opportunities for participation in board governance, grantmaking committees, donor fund development, capacity-building programs, programmatic outreach, advocacy, etc.)
  - Include accountability measures and a check-in timeline developed by the IPT and approved by the President/CEO to track and report the progress of objectives and action items.
- Draft a summary evaluation of the planning process that also includes an initial framework and suggested next steps for SAAFdn's journey in diversity, equity and inclusion. Currently, SAAFdn anticipates that the second phase of its multi-year inclusive philanthropy initiative will begin in 2017 and will address the foundation's internal policies, procedures, practices and culture in relation to DEI.

## Key Deliverables

The Inclusive Philanthropy Taskforce (IPT) expects the consultant(s) to support a communications, planning, facilitation and writing process that ensures the following deliverables:

- Online stakeholder surveys, written summary of best practice research, and data analysis on effective community outreach funds and community philanthropy conducted in advance of first (#1) facilitated session with the IPT;
- Facilitation of first (#1) session with IPT to share data (above), a DEI and cultural competency glossary and a written summary of roles, responsibilities and opportunities for stakeholders in outreach work;
- Facilitation of three separate sessions (#2, #3, #4) i.e., one session with each group of outreach funds: South Texas Hispanic Fund; S. A. Area African American Fund; Women & Girls Development Fund;
- Preparation and facilitation of second session (#5) with Inclusive Philanthropy Taskforce to:
  - Share learning and outcomes of stakeholder sessions with community outreach funds;
  - Begin development of an organizational "blueprint" for inclusive philanthropy that integrates the work of the community outreach funds;
- Written strategic plan ("blueprint") that builds on the assets, opportunities and relationships of the community outreach funds and SAAFdn; includes strategies for engaging diverse donors and strengthening community impact; includes goals, objectives, resources, plan, timeline, metrics, etc.
- Written evaluation of planning process and outcomes and summary of next steps for SAAFdn in inclusive philanthropy.

## Submission Requirements/Proposal Content

Interested parties should submit a proposal, not to exceed five pages, with the following information:

1. Cover Letter
  - a. Description of your team – name, location, contact information, history and areas of specialization
2. Consultant's/Team's credentials and expertise in diversity, equity and inclusion (DEI or D&I)
  - a. Names of all key personnel, specifying experience and qualifications (please indicate staff lead)
  - b. Proposed roles of all key personnel
3. Description of demonstrated planning and facilitation experience with DEI initiatives similar in scope
4. Provide at least two (2) references from recent or current clients (within the last 5 years) with whom you have utilized a DEI approach. Please include:
  - a. Name and contact information of client
  - b. Description of the services provided to the client
  - c. Description of the project, its duration and current status of the project
  - d. If possible, please provide sample plans created using DEI model/approach
5. Proposed diversity, equity and inclusion approach:
  - a. Description and justification of how you will meet the stated deliverables
  - b. Proposed timeline of your process
  - c. Description of your facilitation methodology
  - d. Writing sample (see 4d or provide other sample)
6. Budget aligned with the proposed project tasks not to exceed \$20,000.

## Submission Process

Proposals should be directed via e-mail to:

Martin Acevedo  
Director of Development & Community Partnerships  
San Antonio Area Foundation  
[macevedo@saafdn.org](mailto:macevedo@saafdn.org)  
Subject: RFP for IPT

An online version of this RFP can be found on our Community Outreach Fund page on our website:

[www.saafdn.org/diversity](http://www.saafdn.org/diversity)

## Selection Process

- Request for Proposal (RFP) will be disseminated June 3, 2016.
- Proposals from prospective consultants are due Friday, June 17<sup>th</sup>.
- SAAFDn's Inclusive Philanthropy Taskforce will review proposals;
- Finalists will be contacted by SAAFDn staff for an in-person or telephone interview by June 24<sup>nd</sup>.
- Declines will be e-mailed June 24<sup>th</sup>.
- Consultant's work will begin by early July 2016.
- Project work will be completed by December 31, 2016.
- If you have any questions about the project or application process, please contact Martin Acevedo, above.