



Request for proposals: racial equity and justice initiative

Houston Endowment Inc. (HEI) is issuing a request for proposals (RFP) to engage an evaluation partner for an initial investment of \$20 million as part of HEI's racial equity and justice funding initiative. This is a new initiative for HEI and we are seeking an evaluation partner for an approximately three-year term.

Key dates and information

RFP release date:	Monday, March 1, 2021
RFP close date:	Friday, March 26, 2021 at 5 pm CST
Last day to submit questions:	Friday, March 19, 2021 at 5 pm CST
Timeframe for the evaluation:	June 2021 – September 2024
Total project budget:	Not to exceed \$400,000
Proposal submission:	Email proposals to: bblesi@houstonendowment.org
RFP contact:	Brita Blesi Evaluation Officer Houston Endowment Inc. bblesi@houstonendowment.org

Background

Houston Endowment Inc. (HEI) seeks an evaluation partner for its initial investment of \$20 million in organizations and programs dedicated to racial equity and justice in the Greater Houston area. We welcome proposals from evaluation consultants who are skilled and experienced in evaluating community-based racial equity and justice work and conducting evaluations with an equity focus.

Houston Endowment

HEI has been a vital part of the Greater Houston community for over 80 years through supporting organizations with grant funding. We envision greater Houston as a vibrant community where all people have the opportunity to thrive and are guided by our mission to enhance the vibrancy of greater Houston and advance equity of opportunity for the people who live here. HEI is one of the largest private foundations in Texas with a professional staff and an independent Board. We believe HEI has a strong and positive reputation within the greater Houston area and is generally seen as an independent and objective entity whose only agenda is to achieve what is best for the community. We are proactive in the community — seeking out opportunities and the potential to bring people together to work collectively on complex, multifaceted issues.

The racial equity and justice initiative

In 2020, HEI made a commitment of \$25 million to support organizations and programs dedicated to racial equity, justice, and eradicating anti-Black racism in the Greater Houston area. The \$25 million commitment will be disbursed over four years – June 2020 through June 2024. The initial \$20 million of this initiative has been committed to 55 organizations in the Greater Houston area that are working to address racism and injustices disproportionately impacting the Black community. The remaining \$5 million will be committed at a later date. This evaluation will measure the initial \$20 million that has been committed.

HEI identified the following sectors for the initial \$20 million:

- **Strong Communities:** collaborative, community-based organizations working toward connecting residents to services, confronting racism and other forms of hate, and neighborhood-level change for Black communities
- **Arts, Culture, and History:** support for Black historical, cultural, and civic institutions that have a longstanding relationship with the Black Community in the Greater Houston area
- **Policy and Advocacy:** support for local grassroots organizations, community-centered researchers, and local academic institutions addressing systems-level issues disproportionately impacting Black communities
- **Education:** organizations actively participating in initiatives that center Black youth in their design and programming
- **Strong Families and Children:** support for Black-led organizations providing multi-systemic support to ensure a strong social safety net

Of the 55 organizations supported by the initial \$20 million investment, 19 organizations are categorized in strong communities; 13 in arts, culture, and history; 13 in policy and advocacy; 6 in education; and 4 in strong families and children. These organizations represent landmark Black institutions with a longstanding history serving the community and new, emerging Black voices that are working to move social justice and

racial equity forward in the Houston community. Organizations include existing HEI grantees, organizations that have received HEI funding through a third party, and organizations HEI has not previously partnered with.

Evaluation scope

HEI's approach to learning and evaluation

This project will be managed by HEI's learning and evaluation team. The evaluation officer will be the point of contact for the evaluation consultant. The evaluation will be carried out in partnership with members of the executive leadership team, learning and evaluation team, HEI program team, and additional HEI staff as needed.

Evaluation purpose and use

This initial \$20 million investment in organizations and programs dedicated to racial equity and justice spans four years – from June 2020 through June 2024, with the evaluation active from June 2021 through September 2024. It is anticipated that data collection and other evaluative work will occur throughout the project, with final deliverables completed by September 2024. Participation in this evaluation is not a grant requirement and grantees can decline to participate in any or all evaluation activities. Therefore, it will be important for the consultant to assure that data collection activities and other engagements are meaningful opportunities for grantees to share their work and insights while not being a time or resource burden.

This initiative is a new approach to grantmaking for HEI, as it did not require a full application and 85% of the 55 grants were unrestricted support with no mandatory reporting requirements. Therefore, HEI is interested in learning about the potential impact of this funding approach, unintended consequences, sustainability of change, approaches to developing new relationships with organizations working to address racial equity and justice, and how findings differ between sectors (i.e. strong communities; art, culture, and history; policy and advocacy; education; and strong families and children). HEI staff and leadership plan to use evaluation findings to inform future funding approaches, strengthen funding strategy, and support relationship development. Additionally, findings may be shared with the broader philanthropic community to communicate lessons learned and recommendations for this approach to grantmaking.

HEI anticipates grantees will use evaluation findings to gain clarity on how their work evolved over the grant period, how grantees contributed to any change within systems or the communities they serve, and how findings are similar and different between sectors. Grantees may use findings for program development and ongoing improvement.

Potential evaluation questions

These evaluation questions are not finalized or exhaustive. Instead, they are to give an example of the types of findings that would be useful to learn from this initiative. It is expected that the consultant will facilitate a collaborative process to create and finalize evaluation questions.

1. How did grantees plan to use the grant?
 - a. How did grantees actually use the grant and how was this similar or different from the planned use?
 - b. How did the way grantees used the grant evolve over the grant period?

2. What possible change was due to this investment, if anything?
 - a. What changed within the grantee organizations?
 - b. What changed within the systems or communities served by each grantee organization?
 - c. Where is there evidence to suggest a connection between these changes and the grant?
 - d. How did this change progress over the grant period?
 - e. To what extent is this change sustainable?
3. What were unintended benefits or consequences of this investment?
4. What are lessons learned in using this approach to grantmaking?
 - a. What conditions are required for this to be an effective grantmaking approach?
 - b. If HEI was to use this grantmaking approach again, what should HEI do differently? Keep the same?
5. How did grantees experience partnering with HEI on this initiative?
 - a. What facilitated building a positive relationship?
 - b. What hindered relationship building?
6. How did findings differ by sector, if at all?
7. What did grantees learn through the evaluative process?

Deliverables

Minimum deliverables for this evaluation include:

Deliverable	Due date	Purpose	Audience(s)
Annual short reports	June 2022, June 2023, and June 2024	Update HEI staff and leadership on work completed and initial findings over each year.	HEI staff and leadership
Final technical report	September 30, 2024 (at the latest)	Documentation of how the evaluation was carried out, findings, and recommendations.	HEI staff and leadership
Platform to share final findings with grantees	September 30, 2024 (at the latest)	It is expected that initial findings are shared with grantees throughout the project. Additionally, final findings will be shared with grantees in an interactive format, such as a workshop, website, etc.	Grantees
Platform to share final findings with additional stakeholders	September 30, 2024 (at the latest)	In addition to grantees, evaluation results will be shared with additional stakeholders, such as other philanthropists and community leaders. The platform for sharing results will be interactive, such as a video, website, podcast, etc.	Additional stakeholders
Final presentation to HEI	September 30, 2024 (at the latest)	Consultants will present final findings and recommendations to HEI staff and leadership. This deliverable includes a thorough presentation (e.g. PowerPoint) that HEI can use in the future to communicate about the project.	HEI staff and leadership

Final deliverables in 2024 should be staggered with the last deliverable received by 9/30/2024 at the latest. The order of the deliverables can be proposed by the consultant.

Proposal requirements

Proposals should include responses to the six sections outlined below. Please limit the first three sections of your proposal (approach, qualifications, and organizational diversity) to 10 pages. There is no page limit for the workplan, budget, and references. In your full proposal, please include:

1. Approach

Provide the following:

- Your organizational or professional values and how they drive your evaluative work
- Your approach and planned activities in each phase of this evaluation, including:
 - Designing the evaluation, creating and finalizing evaluation questions, and designing data collection tools
 - Methods to answer the evaluation questions, including how you will assure that data collection is meaningful and a low resource burden for grantees
 - How you will share back findings in a way that is meaningful and useful for grantees and HEI staff and leadership
 - How you will work with HEI to design final deliverables
- Your approach to project management, including how you will assure project activities and deliverables remain on track and how you will keep HEI informed throughout the project
- Your data security process and systems

2. Qualifications

Describe the qualifications of each consultant proposed to be an evaluation partner for this project. Please include examples of similar evaluation projects these individuals have worked on. Indicate if subcontractors will be involved in this project, as all subcontractors will require prior written consent from HEI. Additionally, indicate the project lead, point of contact (if different from the project lead), and additional evaluation team members. Please attach a resume for each proposed team member, including any subcontractors.

3. Organizational diversity

As a private foundation committed to diversity, equity, and inclusion, HEI recognizes the importance of partnering with vendors, suppliers, and consultants that embody and share our commitment. HEI believes that identifying, engaging, and building relationships with diverse vendors, suppliers, and consultants furthers our mission of advancing equity of opportunity for the people of Greater Houston and enhancing the vibrancy of our region. Please provide any relevant information regarding the diverse ownership of your business, the diversity of your staff, and/or how your business seeks to promote diversity, equity, and inclusion.

4. Workplan

Attach a high-level workplan for completing the project. The workplan should begin in June 2021 with data collection ending by June 2024 and final project deliverables completed by September 2024. Please include:

- Key activities
- Dates and timelines
- Deliverables

Please also include a communications and engagement plan. This can be embedded within the workplan or a standalone plan. Please include:

- Your approach to communicating and engaging with HEI, such as typical format of meetings, frequency of meeting, approach to collecting HEI feedback, etc.
- How you plan to communicate and engage with external stakeholders (e.g. grantees), such as your approach to outreach and carrying out data collection, sharing findings, and any ongoing communication
- How your approach will be similar and different during the current COVID-19 pandemic compared to a future possibility of being able to meet in person

5. Budget

No more than a total of \$400,000 is available for this evaluation, including all expenses incurred by the consultant. Please include a high-level budget that is based on your workplan and spans from June 2021 through September 2024. The budget should outline cost allocations by evaluation activities, such as evaluation design, data collection, analysis, and reporting. Please also include additional costs, such as compensation or incentives for evaluation participants, travel, indirect costs, etc.

6. References

Include up to three references who you have previously worked with to complete evaluation projects. References may be contacted and asked to discuss their experiences working with you. Please include:

- Reference contact information
- Brief description of the project
- Project timeframe
- Project budget

Submission instructions

Email a PDF of the proposal and supporting documents to:

Brita Blesi, Evaluation Officer

bblesi@houstonendowment.org

Collaborative proposals involving two or more organizations will be accepted.

Timeline and activities

Key dates

The RFP will be open from Monday, 3/1/2021 through Friday, 3/26/2021. All proposals must be received via email by **5 pm CST on Friday, 3/26/2021**.

Questions may be emailed between Monday, 3/1/2021 through Friday, 3/19/2021. Please send all questions to:

Brita Blesi, Evaluation Officer
bblesi@houstonendowment.org

All questions must be received via email by 5 pm CST on Friday, 3/19/2021.

Proposals will be reviewed and scored by HEI staff between Monday, 3/29/2021 and Friday, 4/9/2021. Finalists will be selected and invited to participate in an interview with HEI staff. Interviews will take place between Monday, 4/12/2021 and Friday, 4/23/2021 via Zoom.

HEI will select and notify a consultant by Friday, 5/7/2021.

Date(s)	Activity
March 1, 2021	RFP release
March 19, 2021	Last day to submit questions
March 26, 2021	Last day to submit proposals
March 29 – April 9, 2021	Proposals reviewed
April 12 – April 23, 2021	Interviews with finalists
May 7, 2021	Consultant selected and notified
May 10 – June 1, 2021	Contracting and establishing statement of work

Proposal evaluation

Proposals will be evaluated based on multiple criteria, which include but are not limited to:

- Evaluation design
- Meaningful engagement with stakeholders, including facilitation approach and techniques
- Experience with similar evaluation projects, including experience applying an equity lens
- Qualitative and quantitative methods

HEI reserves the right to modify, supplement, or withdraw this RFP at any time, and issue one or more addenda to this RFP. No part of this RFP and no part of any subsequent correspondence by HEI or its employees, directors, officers, or agents shall be taken as providing legal, financial, or other advice or as establishing a contract or contractual obligation. Contractual obligations will arise only if and when definitive agreements have been approved and executed by the appropriate parties having the authority to approve and enter into such agreements. HEI will, in its sole discretion and without limitation, evaluate proposals and proceed in the manner HEI deems appropriate.